BusinessConnect™ Insight
Common Administration

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Important Information

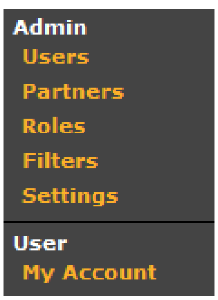
Contents

1 Introduction

Document Purpose

This document is for administrators of BusinessConnect™ Insight (BCI).

It describes how to use these Admin pages:



Other pages are described in the BusinessConnect™ Insight Users' Guide.

Configuration information is in **BCI_Installation_Config*nn*.pdf**.

Administrator's Job

As administrator, you will set up and maintain users, partners, roles, filters, and settings for BCI.

You will need to be familiar with EDI and have access to information about trading partners. Website programming knowledge is not necessary.

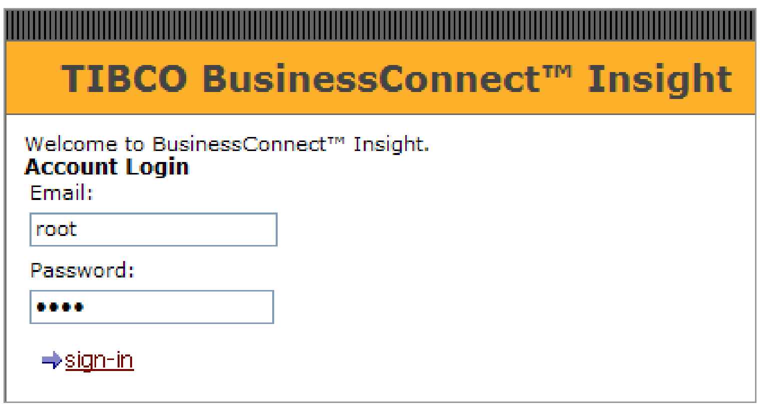
2 Basics

Logging in

Logging in to BCI

When performing administrative duties, log in to BCI using an account with full administrative privileges.

Type Email and Password and click **sign-in**.



A common login error is typing the user name rather than the e-mail address.

Remember Login saves your Email and Password. If you do not click Logoff, the next time you start your browser and access BCI, you will skip the Account Login page. If you do not want the Remember Login option to appear, please see **Removing the Remember Login Box** in **BCI_Installation_Config*nn*.pdf**.

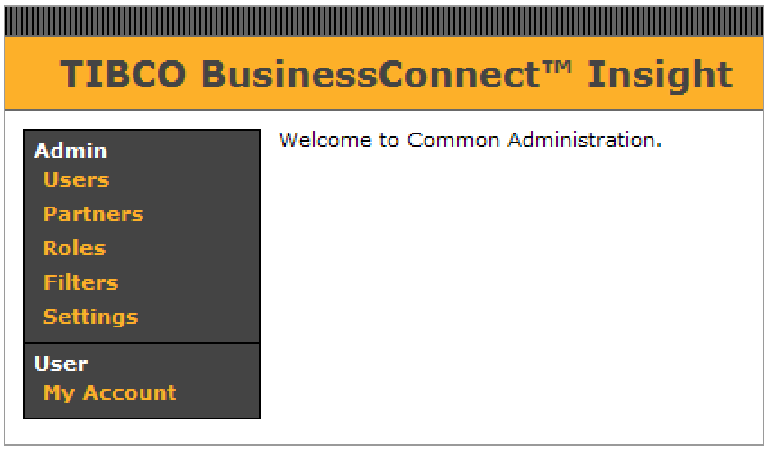
For details on how login information is defined, see Setting up New Users on page 23.

Two people cannot log in with the same e-mail address at the same time. For example, if someone is logged in to lwb@att.net, another person logging in to lwb@att.net will force the first login off.

Entering Common Administration

If you logged into an account with administrative privileges, the initial screen will offer a Common Administration link, along with a link to BCI.

Click **Common Administration** to see the administrative menu:



Creating an Administrative User

Right after installation, log in to root.

Create an administrative user for yourself (see Setting up New Users on page 23) and assign it the **All Partners** group and the **Administrative** role.

Log in as that user when you perform administrative duties.

Password changing, expiration and deactivation

Changing your own password

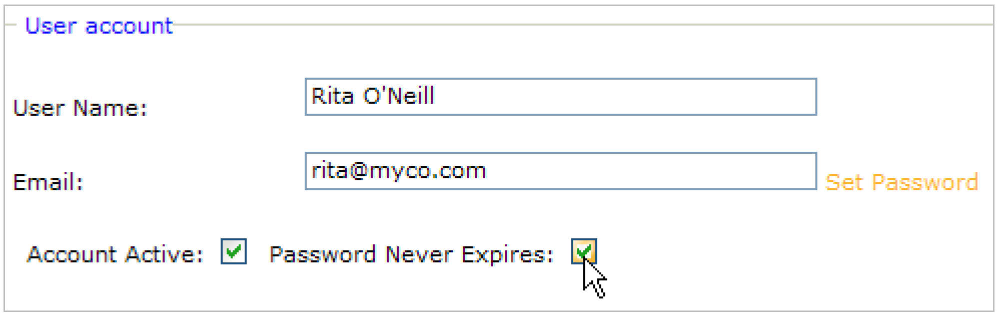
Each application has a **My Account** page where users can change their passwords.

Changing another user's password

An administrator can update passwords in Common Administration:

1. Choose **Users**.
2. Edit a user and be sure that **Account Active** is selected.
3. Click **Set Password**.

   When creating or editing a user, you can set the password to never expire:



The expiration interval is configurable under **Settings | General Settings**. See Expiration and password minimum complexity on page 5.

If you cannot log in as any user with administrative privileges, including root, contact TIBCO Foresight technical support.

Deactivation

A username is deactivated if:

- Someone enters three consecutive invalid passwords when trying to log in
- Someone starts to change a password and then does not finish

An administrator can reactivate the user by:

1. Clicking **Users**.
2. Editing the user.
3. Selecting **Account Active**.
4. Entering a password (if they don't remember it).
5. Saving changes.

Expiration and password minimum complexity

To set up requirements for password expiration and complexity:

1. Log in as an administrator.
2. Choose **Settings | General Settings** and fill out the top of the page:

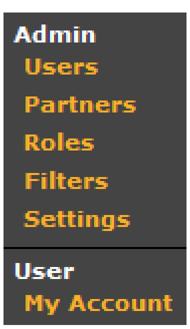
Password Expire Period	Type the number of days that a password is valid.

Reuse Password Aging	Type the number of days until a password can be reused.
Strong Password Required for ALL users?	To set minimum length and other password requirements: a. Choose **On** and click **OK** when asked to confirm (you will still have to Save Changes at the bottom). b. Type a minimum password length. c. Select **Yes** for any other requirement that their password must meet. Choosing On or changing any other Strong Password setting causes all users except root to be prompted for a new password the next time they log in. This includes those with passwords that never expire. If a user tries to change the password to one that is not compliant, a message displays current requirements.
DefaultDateRange	Type the number of days to be used as the default date range for the transmissions, success rate, and document pages.
IsExternalIdentifierUsed	If this is on, the external partner identifier is enabled, allowing users to sort by IDs and name.
IsInternalIdentifierUsed	If this is on, the internal partner identifier is enabled, allowing users to sort by IDs and name.

3. At the bottom, click **Save Changes**.

Administrative pages

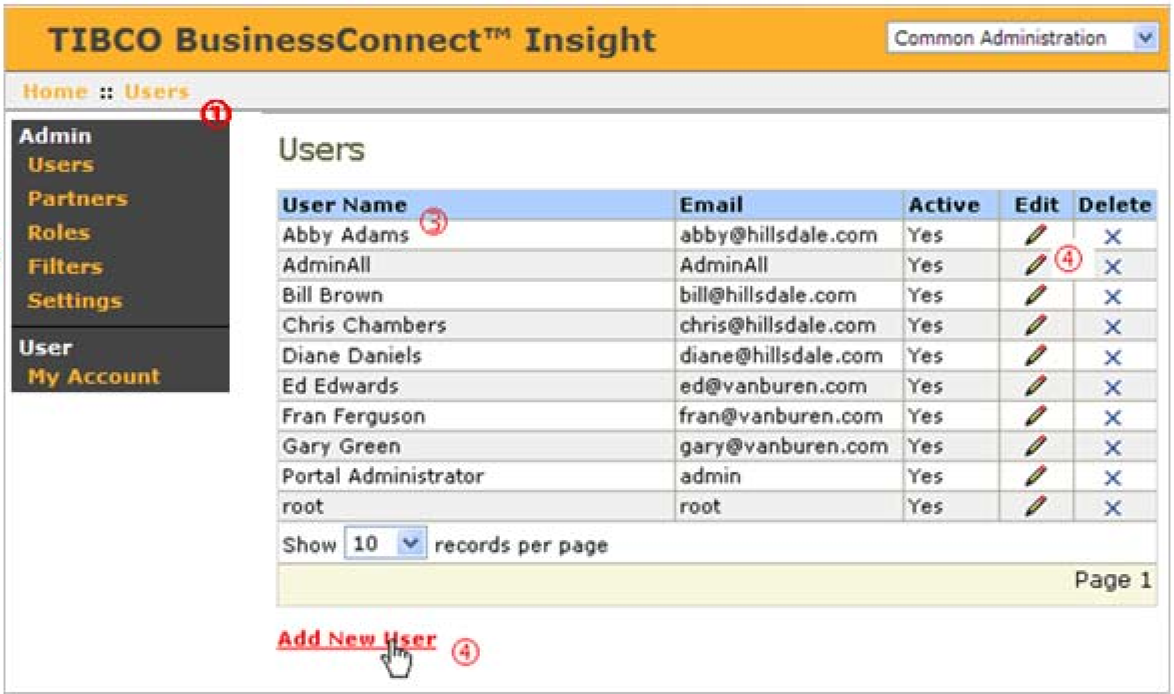
Administrative functions are on these pages under Common Administration:



Only users who have been given a role with administrative privileges can see these pages. Administrative access should be restricted to internal users who are actually administering the application.

Navigating

Pages typically have these elements (click the **Users** link to see this page).



① The navigation bar, or "breadcrumbs," along the top lets you go directly to previous levels.

② The main menu down the left side lets you go to any first level page.

③ You can sort on some columns by clicking on their headings.

④ Links vary by page. Links for adding new items are always at the bottom left.

Click the **Roles** menu to see the page shown below.

Some pages have:

Pushpins Edit an item's subordinates.

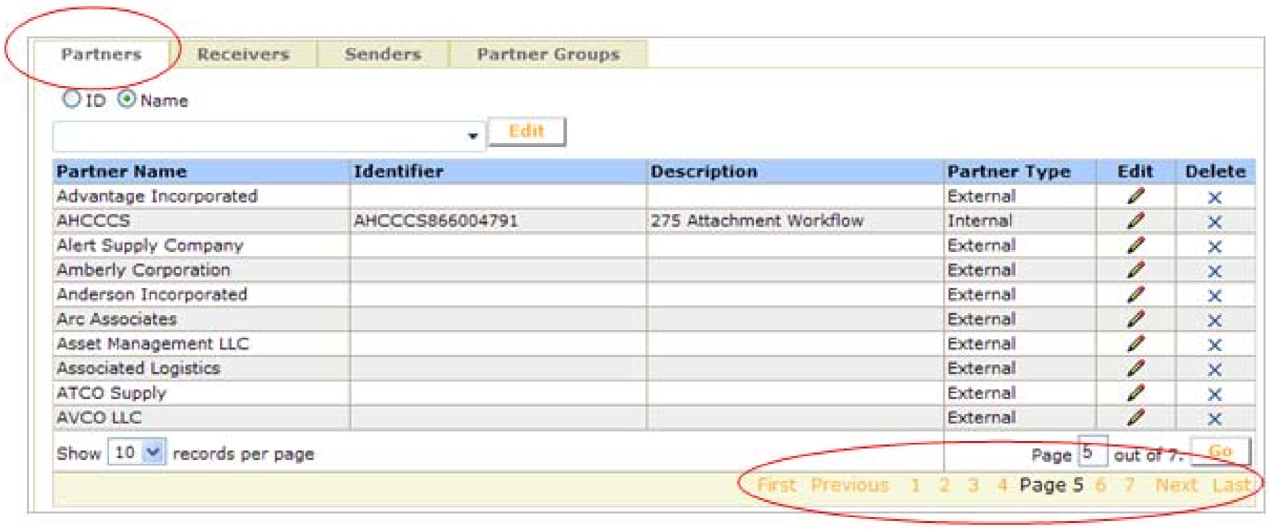
Edit pencils Edit an item's name and subordinates.

	Role Name	Edit	Delete
	Administrators		×
	Data Entry		×
	Task Distributor		×
	Auditor		×
	Typical User		×
	Add new row...		
			Page 1

Click the **Partners** menu to see the page shown below.

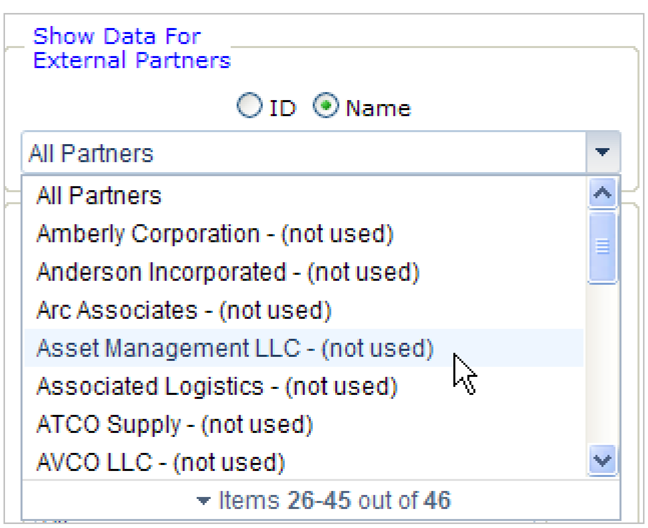
Some pages have:

Tabs	Selected tabs are always white and unselected tabs are darker. This example has four tabs, and we are currently looking at the Partners tab.
Page numbers	Page numbers at the bottom right let you see more items.



Selecting from a list

BCI has many drop-down lists like this one:



To find a selection that is not showing:

Scroll Bar
Use the scroll bar to scroll up or down.

Arrows

Click on the arrows on the bottom border to display more entries at the bottom of the list.

Type
Clear the top line and start typing the name or ID of the entry you are seeking.

Dates and times

Two types of dates appear in BCI:

- The date when Instream validated the data - see Validation dates below.
- A date from the EDI data itself – see Dates from EDI data on page 10.

Validation dates

Most dates in BCI are validation dates. Examples:

<table>
<tr><td>Next to graph on Statistics pages</td><td>Start Date: 5/19/2010 End Date: 5/26/2010</td></tr>
<tr><td>Errors page (after clicking on an error number)</td><td><table><tr><th>Submission Date</th><th>Transmission</th></tr><tr><td>1/29/2009 4:19:41 PM</td><td>Tutorial-C.edi</td></tr><tr><td>1/29/2009 4:19:41 PM</td><td>Tutorial-C.edi</td></tr></table></td></tr>
<tr><td>Transmissions pages</td><td><table><tr><th>Date</th><th># Bytes</th><th># Transmissions</th></tr><tr><td>5/26/2010</td><td>3519</td><td>1</td></tr><tr><td>5/25/2010</td><td>48201</td><td>10</td></tr></table></td></tr>
</table>

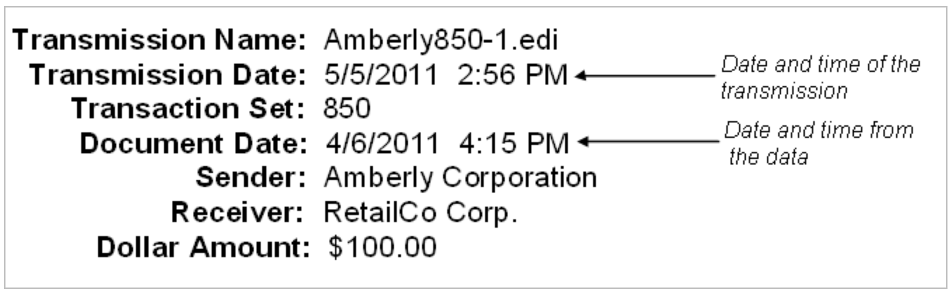
Dates from EDI data

In some places, you will see a **Document Date** – a date taken from the EDI data itself.

The EDI element that contains the document date varies by transaction. See Appendix C of the BCI Users' Guide.

Errors Page

Click **Errors**, click on an **Error Code**, and click a **Document ID**. You will see two dates for that document:



Transmissions Page

Click **Transmissions** and then click on a date. At the bottom, open a transmission by clicking its plus sign.

The Document Date is from the EDI data itself:

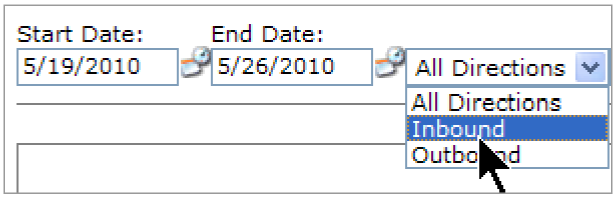
DOC #	Amount	Assigned	Document Date
1	100.00		7/16/2009 4:15:00 PM
2	200.00		7/16/2009 4:15:00 PM
3	300.00		7/16/2009 4:15:00 PM
4	665.75		7/16/2009 4:15:00 PM

The Original File Date is text passed to BCI with the validation command line parameter **m**. See **InStreamValidationTechnicalManual.pdf**.

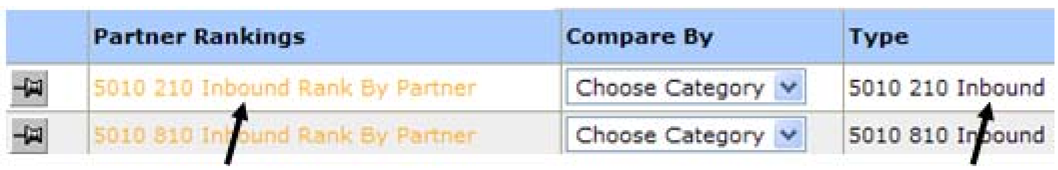
Inbound and outbound documents

BCI distinguishes between inbound and outbound data to make it easier for users to find their own company's data.

Example: Transmissions page



Example: Documents page



Inbound and Outbound are from the point of view of the BCI host:

Inbound Data sent *to* the BCI host's organization.

Outbound Data sent *from* the BCI host's organization.

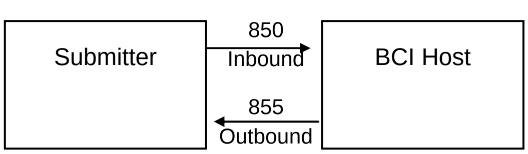
It is **not** determined by any value in the EDI, including in the enveloping.

It is determined by:

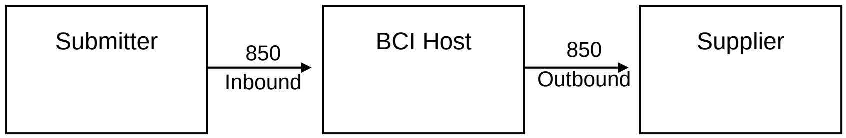
- Importer's command-line parameters **i** and **o**. See **Importer.pdf**.
- In an Automator workflow, the **Direction** property in the Importer component's XML file.

Examples of Inbound and Outbound Data

- 850 Purchase Order data received by the BCI host is inbound data. 855 Purchase Order Acknowledgement data it sends to submitters is outbound data.



- 850 data that it received by the BCI host from submitters is inbound even though the receiver ID may be another company. The BCI host then repackages the 850 and sends it on to the other company. This transmission of the 850 is now outbound from the point of view of the BCI host.



E-mails

BCI sends e-mails to users who:

- Have a valid e-mail address set up under Users (see Setting up New Users on page 23).
- Have e-mail frequency set to **All emails** or **Only one until next login**.
  (Only one until next login means only one of each type listed in the table below)

Circumstance	Sent to …	Configuration	Sent by …
User selects **Email This Page as a Report** at the bottom of any Statistics page and the Task Analysis page	Addresses typed by user	SmtpServer and FromAddress in Web.config	User clicks **Send Email**

3 Administrator Pages

List of Administrative Pages

Your activities as an administrator include setting up and maintaining:

Partners

A partner is an organization that sends data to or receives data from the BCI host.

Troubleshooting Partner Problems

Before importing data for a partner, be sure that both the sending and receiving partners are set up on the Partners page in Common Administration. This includes information on the Senders and Receivers tabs.

Please see Partner Assignment Errors on page 41 for details on how to troubleshoot partner problems.

External and Internal Partners

- **Internal partners** are divisions of the BCI host.
- **External partners** are those who exchange EDI with the BCI host.

What every Partner Needs

As a minimum, you need to specify this information for each partner:

Specify this …	See page …
Partner name	15
Partner type – internal or external	15
Values that identify data sent TO and/or FROM this partner	15

In addition, you will normally specify this information so that the data can be seen by someone in addition to those who have been assigned All Partners:

Specify this …	See page …
A partner group that contains this partner	19
Users who have access to that group	18

Setting up a Partner

Before sending data to BCI, be sure you have set up a partner for both the sender and the receiver. This includes setting up one or more partners for the host itself.

Adding a partner

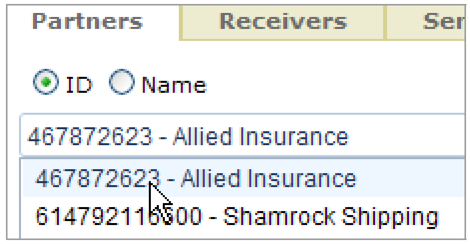
Before adding a partner, know what values will uniquely identify the partner in incoming data and in outgoing data.

To add a partner:

1. Log in with administrator privileges.
2. In Common Administration, click **Partners**.
3. Click **Add New Partner** at the bottom.
4. Fill in the top of the Add New Partner page:

Partner Name This will show up on reports and lists.

Identifier Optional; you can sort partner filters by identifier or name on Statistics pages. This example sorts the list by ID:



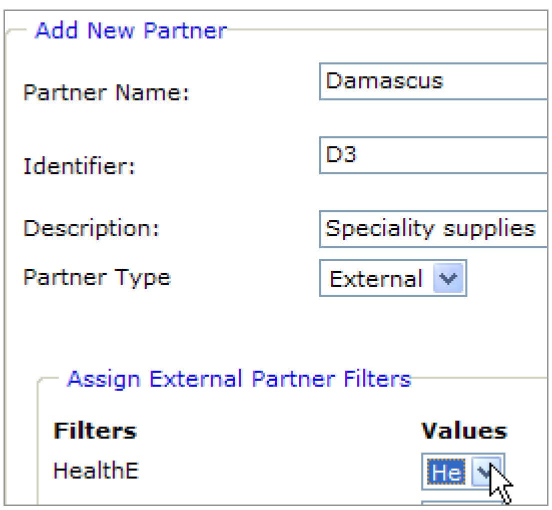
Description Optional; for your use.

Partner Type **Internal** (part of the BCI host) or **External** (one that exchanges EDI with the BCI host).

5. If partner filters exist, they appear at the bottom of the page.

   Choose a value for each partner filter that applies. A partner need not have a filter, or can have multiple filters.

   Partner filters are subsets of your partner community. They let you see statistics for just this subset on any of the statistics pages.



   Where did filters come from? See Filters on page 25.

6. Click **Save**. Look for a confirmation message at the top.

Identifying partner data

Before BCI starts handling data for this partner, specify what values will *uniquely and completely* identify the partner as:

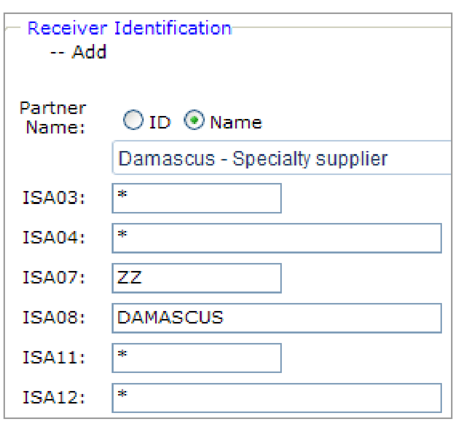
- The sender of incoming data
- The receiver of outgoing data

You can do this in two ways:

- By pointing to data inside the transaction set (rather than in the enveloping). This requires guideline changes. Contact your TIBCO Foresight representative.
- By pointing to certain data in the interchange or group enveloping. This is described below.

Identifying this Partner as a Receiver of Data

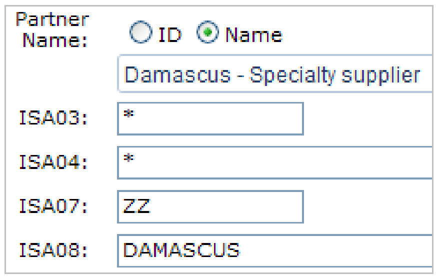
1. On the main **Partners** page, click the **Receivers** tab.
2. Click **Add New Receiver Data**.
3. Select the partner.
4. Type values that will be in data received by this partner and that will uniquely identify that partner.
   - For data to be identified as belonging to this partner, values that you enter here must ALL be present in the data.
   - Omit trailing blanks, even if they will be included in the data to meet minimum lengths.
   - The values are case-sensitive.
   - A blank for a value means that only a blank value will match.
   - An asterisk means that any value will match.
   - Do not leave asterisks in every field.
   - Be sure **that the same combination of values does not belong to any other partner.** If enveloping does not uniquely identify a partner, you can do so with data inside the transaction set (rather than in the enveloping). This requires guideline changes.

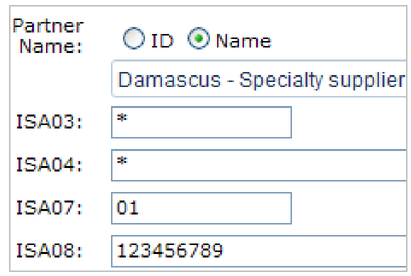


5. Click **Save**.

A receiver may have several ways of being identified. If so, enter each separately.

Example: If Damascus receives data that can have either DAMASCUS or their DUNS number in the ISA08, click **Add New Receiver Data** again and set up separate receiver identifications for each:





You may also need to set up different identification for each transaction (210, 855, etc.) that a partner receives.

Identifying this Partner as a Sender of Data

1. On the main Partners page, click the **Senders** tab.
2. Click **Add New Sender Data**.
3. Select the partner.
4. Type values that will identify data sent from this partner.
   Be sure that the same combination of values does not belong to any other partner.
5. Click **Save**.

When finished setting up a new partner

Go to the **Partners** tab and notice the new partner listed among the others. To find the partner, you may need to click on another page number at the bottom right.

Your next step is to put this partner in a new or existing partner group as described in Partner Groups on page 18.

Be sure that the organization that is exchanging data with this new partner is also defined as a partner. This may be one or more internal partners for the BCI host.

Partner Groups

A partner group is a named set of partners. Partner groups are used in two ways:

User access When users log on, they will see statistics and data for the partners in partner groups to which they have access.

Filters An administrator can set up a Partner Group filter. See Setting up Partner Group Filters on page 30.

Normally, each partner is in at least one partner group. Otherwise, only users with All Partners can see their data.

Partner Group Example

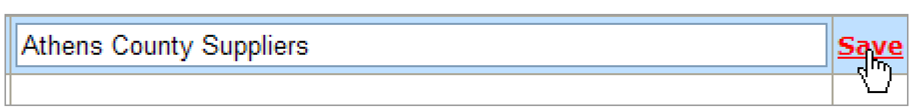
You could set up an Athens County Suppliers group that includes several related partners. You can assign this group to users who should be able to see data for any or all of these partners, but no other partner's data. You might assign this group to:

- Certain staff from the entire supply organization: perhaps two users from a billing department, an EDI specialist, and two managers.
- An internal user from the BCI host who is responsible for the EDI trading relationship with the set of partners.

You would not assign the group to a user in one of the individual partners who should not see the data from the other partners.

Creating a partner group

1. Log in with administrator privileges.
2. Click **Partners** on the main menu and then choose the **Partner Groups** tab.
3. Click **Add new Partner Group** at the bottom.
4. Type a name for the group (up to 25 characters) and click **Save**.



5. Finish defining the partner group by:

Choosing partners for a partner group .... page 19

Giving users access to a partner group .... page 19

Setting up folders for a partner group.. page 19

Choosing partners for a partner group

To specify which partners are in a partner group:

1. From the main **Partners** page, choose the **Partner Groups** tab.

2. Edit the group by clicking its name. You may have to use the page numbers at the bottom right to find it.

3. At the bottom, choose the **Assign Partners** tab.

4. In the left box at the bottom, select one or more partners that users with this group can see (use **Ctrl-click** to select scattered partners, and **Shift-click** to select a range of partners).

5. Click > to copy selected partners to the Assigned Partners box.

6. Click **Save Changes**.

Giving users access to a partner group

To set up the list of users who can see data for partners in a group:

1. From the main **Partners** page, choose the **Partner Groups** tab.

2. Edit the group by clicking its name. You may have to use the page numbers at the bottom right to find it.

3. At the bottom, choose the **Users** tab.

4. In the left box, select the users (use **Ctrl-click** to select scattered users, and **Shift-click** to select a range of users).

5. Click > to copy selected users to the Assigned User(s) box.

6. Click **Save Changes**.

Setting up folders for a partner group

Partner groups can have one or more folders on the web server machine where users can upload and/or view files. This is an easy way for the host to make reports and acknowledgements available to users.

To set up folders for a partner group:

1. From the main **Partners** page, choose the **Partner Groups** tab.

2. Edit the group by clicking its name. You may have to use the page numbers at the bottom right to find it.

3. At the bottom, choose the **Folders** tab.

4. Click **Add New Folder**.

5. Type a name for this location.

6. Type a local path on the web server. If this folder does not exist, it will be created.

   It is a good security practice to have this be a local directory on the BCI web server machine, rather than a mapped drive or network path to another machine.

   For more information, see the Microsoft article Access Permissions for Web Applications at:

   http://msdn2.microsoft.com/en-us/library/Aa983543

7. Select **View** if you want users in this group to be able to view files in this folder.

8. Select **Upload** if you want users in this group to be able to upload files to this folder. HTTP protocol is used for uploading files.

9. Click **Save**.

10. Repeat for other folders for the group.

Log off and log back on before testing the View and Upload pages.

Example

In the example below, the Athens County Suppliers group will have these folders:

- A folder where they can upload EDI files for processing by BCI.
- A folder where group members can upload and view miscellaneous files. No BCI action is to be taken on these files.

Assign Partners | Users | Folders

Name	Path	View	Upload
Athens in EDI	d:\Athens\inEDI	☐	☑
Athens Misc	d:\Athens\misc	☑	☑

Maintaining a partner group

1. From the main **Partners** page, choose the **Partner Groups** tab.

2. Locate the group. You may have to click on another page number at the bottom right.

3. Take one of the following actions.

To …	Do this …
Delete the group	Click the **X** in the Delete column. The group is deleted immediately.
Change the group name, partners, users, or folders	Click the group’s pencil in the Edit column.

4. Save the changes.

Maintaining Partners

1. Click **Partners** on the menu on the left.
2. Locate the partner. You may have to click on another page number at the bottom right.
3. Take one of the following actions.

To …	Do this …
Delete the partner	Click the **X** in the Delete column. The partner is immediately deleted if it does not have data already assigned to it in BCI. If it has data, reassign the data to the correct partner (see Moving Data to the Correct Sender or Receiver on page 42) and then return to delete the unwanted partner.
Change the name, description, identifier, partner type (external or internal) or filters	Click the partner’s pencil in the Edit column.
Change the identifying data	Click the **Receivers** or **Senders** tab. Click the partner’s pencil in the Edit column.
Change its partner group	Click the **Partner Groups** tab.

Errors in Partner Assignment

If BCI appears to be assigning results to the wrong partner, or if you cannot find expected results in BCI, suspect that you may have incomplete or erroneous information under **Partners | Senders** or **Partners | Receivers**.

See page 41 for details on diagnosing and fixing partner assignment errors.

Roles

A role is a set of permissions that determines what pages and form fields can be viewed. Each user is assigned at least one role.

Steps include:

1. Defining a role.

2. Assigning a role to a user.

Defining a Role

1. From the left menu, choose **Roles | Add new row** … .

2. Type a name for the role and click **Save**.

3. On the **Permissions** tab at the bottom, select the permissions for users who have this role.

   See User Permissions on page 49.

4. Save.

Assigning a Role to a User

1. On the **Roles** page, click the name of the role.

2. Choose the **Users** tab.

3. Choose the users under **Available Users**. Use *Ctrl+click* or *Shift+click* to choose multiple users.

4. Move them to **Assigned Users** by clicking the  button.

5. Save Changes.

All users get access to My Account. Other permissions have to be set through Roles. Please see page 49.

Users

Setting up New Users

A user is someone who can log in to a BCI application.

Adding a User

1. Log in with administrator privileges.

2. Be sure that you have set up a role with the correct permissions for this user (see Roles on page 22).

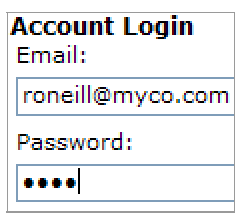
3. Click **Users**.

4. Click **Add new user** at the bottom.

   Fill in the top of the Add New User page:

User Name How their name is to be displayed within BCI.

Email User's e-mail address; used for login (because it is always unique).



The address is also used for e-mail alerts for this user. Please be sure that this a properly formatted and valid e-mail address if this user is to get alerts.

If the user will not need e-mail alerts and does not belong to a team, then you need not enter a valid e-mail address and can omit the @-sign. In that case, you may want to use something shorter.

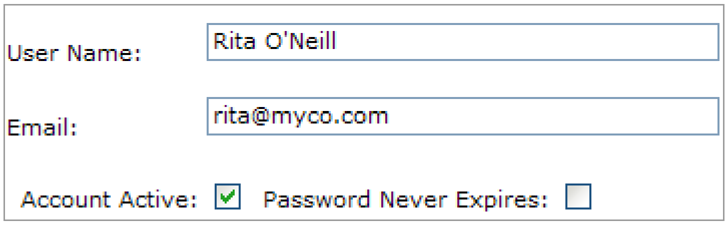
Password Password of your choice.

Confirm Password Type password again.

Account Active If selected, the user can log in.

Password Never Expires — If selected, the user's password will not expire.

Example:



5. Click **Save**.

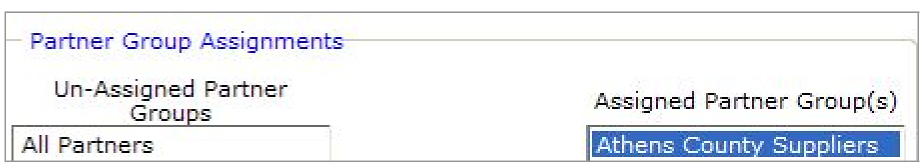
Assigning Roles to a New User

Fill in the bottom of the **Add New User** page:

1. Use **Ctrl**+*click* to select the roles for this user and then press the > button.

2. Similarly, if this is an BCI user, select the partners whose data this user can see.

   All Partners is for internal users who will need to see all current and future partners. This is appropriate for internal users like BCI administrators.



3. Save.

4. Look for the confirmation message at the top of the page.

Maintaining Users

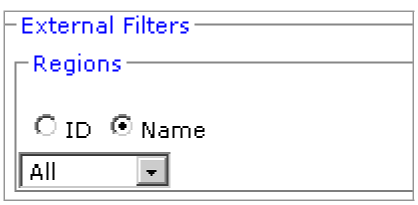
1. Click **Users** on the menu on the left.
2. Locate the user. You may have to click on another page number at the bottom right.
3. Take one of the following actions.

To …	Do this …
Delete the user	Click the **X** in the Delete column. The user is immediately deleted.
Change the user's name, e-mail address, active status, password expiration, groups, or partners	Click the user's pencil in the Edit column.
Change the user's password	Click the user's pencil in the Edit column, and then click **Set Password**.

Filters

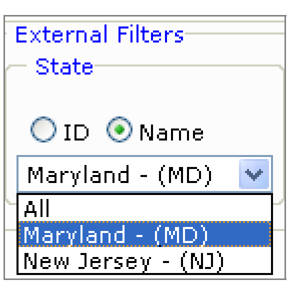
A filter is a set of values that lets BCI users select documents based on certain attributes of the partners or of values in the data itself. They are available on BCI statistics pages.

Example:



Setting up Partner Filters

A partner filter lets the BCI user select certain partners for inclusion on statistics pages.



Creating a Partner Filter

To set up a partner filter:

1. Log in with administrator privileges.
2. Click **Filters** on the main menu.
3. Confirm that the **Partner Filters** tab is selected.
4. Select a **Filter Type** at the top.

   External means the filtering is based on an attribute of an external partner.

   Internal means the filtering is based on an attribute of an internal partner.

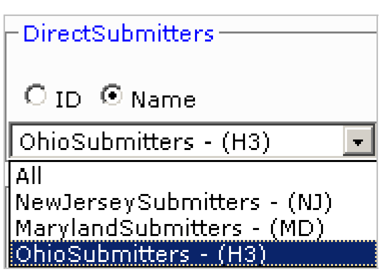
5. Click **Add new row…** .
6. Fill in:

Filter Name	Name to appear above the drop-down lists for filtering reports.
Description	For your own use.
Is FilterID Used	Optional ID that can be used for sorting filter values on statistics pages.
	These are enabled globally under **Settings | General Settings**.
Is Filter Generated	If selected, BCI automatically generates the filter values and assigns them to partners based on criteria that you specify. See page 28. If not selected, you type the filter values yourself, and you assign filter values to partners.

7. Click **Save**.

Assigning Values and Partners to a Partner Filter

After creating a filter, specify what values should appear in its list:



You can do this in two ways:

- You can type the values and then specify which partners have which values. In this case, do not select **Is Filter Generated**.
- BCI can build the list from EDI data and assign values to partners. In this case, select **Is Filter Generated**.

Filter Name	Description	Is FilterID Used	Is Filter Generated
DirectSubmitters	Clearinghouses and direct submitters	Yes	Yes
Regions	Assigned region	Yes	No

When the Administrator sets up Values and Partners

With this method, you are responsible for keeping the list of filter values updated and for assigning filter values to new partners.

From the **Filters** page:

1. Click the select button in front of a filter that has **Is Filter Generated** set to **No**.
2. Click **Add new row …** at the bottom of the **Filter Value** column.

   Fill in these fields:

Filter Value	Type a value to appear in the drop-down list.
Filter Identifier	Type an ID if you are using them (see **Is FilterID Used** on page 26).
Order	(Optional) Type a number for the order in which the value is to appear in the filter's drop-down list. This is an integer greater than 0. If omitted, they are alphabetized.

3. Click **Save**.
4. Continue using **Add new row** and saving until all possible values are included.

To see the filter, go to a statistics page. If the filters are not showing, click **Expand** at the far right.

After the filter has some values, assign filter values to partners:

1. From the main Filters page, click **Assign to partners** in the filter's Assign column.
2. Under **Assign to**, select a filter value.

3. Under **Available Partners**, select partners who have that value. Use *Ctrl+click* to select multiple partners.

4. Click **Assign** and notice the partners in a field at the bottom.

5. Under **Assign to**, select another filter value and repeat the assignment process.

6. When finished, leave the page. The assignments are automatically saved.

When BCI generates the Filter Values and Partners

With this method, BCI keeps the list of filter values updated and assigns filter values to partners.

From the **Filters** page:

1. Click the select button in front of a filter that has **Is Filter Generated** set to **Yes**.

2. Under **Generated Filter Detail**, select the criteria that will be used to add a value and/or a partner to the filter: This affects new partners but does not check data for partners who are already defined in BCI.

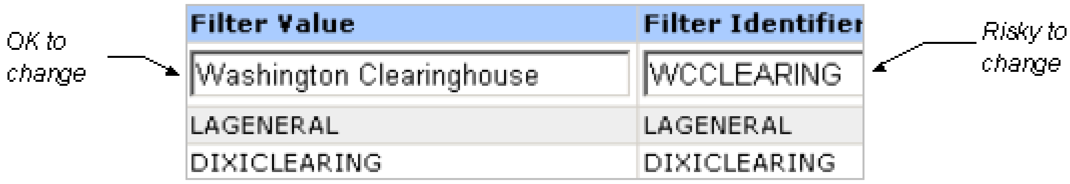
Field	**Meaning**
Transaction Set	Which transaction sets will be affected by this filter?
Partner Type	Are the partners to be included senders or receivers?
Direction	Is the data inbound or outbound?
When a new filter value is found	Initially, select **Create a new filter value** so that BCI can build the list of filter values and assign partners. At some point, you will notice that you have collected all filter values that you want. Additional values coming in are erroneous or obscure. To lump all future values into a line in the filter called "Other," change this to **Add to "Other" filter value**.
Elements	Which EDI element contains the value for the value list?
Only Unidentified Partners	Initially, do not select this. Let BCI check all new partners and assign them to a filter value. Thereafter, select **Only Unidentified Partners** so that doesn't keep re-evaluating partners that it has already considered.
Rebuild	This is a last resort. It deletes all filter values and rebuilds them by checking all transmissions in the database. If you have customized filter value names, these are lost.

3. Save.

When BCI encounters data from a new partner, it will snag the data and add it as a filter value.

The new filter values are refreshed in the drop-down on the web portal at an interval specified by PartnerFilterRefreshInterval in Web.config. Default is every 12 hours.

After the process runs and populates the filter from data in the database, you can edit the filter and change the Filter Value, which only affects how the value displays in the list.



Do not change the Filter Identifier except under special circumstances. That is the actual value from the data or custom record.

If filter entries do not appear on the Filters | Partner Filters tab

Have you imported some new data that should have triggered an auto-generate of the filter values?

Has BCIUtilities run to add the entries to the filter?

Have you created and merged the necessary guidelines?

Maintaining Partner Filters

1. Click **Filters** on the menu on the left.
2. Take one of the following actions.

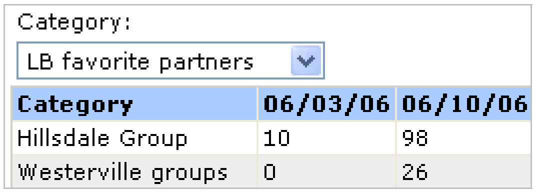
To …	Do this …
Delete the filter.	Click the **X** in the Delete column. The filter is immediately deleted.
Change the filter name, description, FilterID setting, Filter Generated setting, or values.	Click the filter's pencil in the Edit column.
Change the filter's values.	Click the group's pushpin , pencil, or name. Values will show up at the bottom of the page, if there are any. You can edit the values or add new ones.
Add a new filter.	Click **Add new row** below the list of filter names. See Setting up Partner Filters on page 25.

3. Click **Save**.

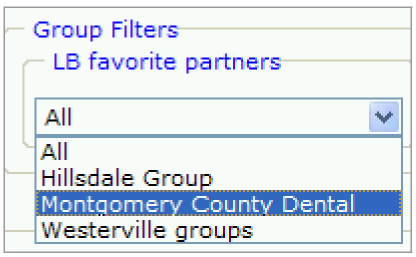
Setting up Partner Group Filters

A partner group filter lets the BCI user select certain partner groups for inclusion in reports.

This example shows partner group filter **LB favorite partners** being used in a category compare. It compares partner groups to one another:



Here is the same filter as it appears under the Filters section of all Statistics pages:



They offer these capabilities over simply using partner filters:

- Group filters are usually for “favorites” groupings, whether these partners have anything else in common or not.
- Both internal and external partners can be in the same group filter. Regular partner filters must be all internal partners or all external partners.
- You can put a partner in multiple partner groups, and then include those groups in a group filter. This lets a partner have more than one filter value that includes them in a group filter.

Creating a Group Filter

1. Log in with administrator privileges.
2. Click **Filters** on the left menu.
3. Select the **Group Filters** tab.
4. Click **Add new row …** at the bottom.
5. Type a name and optional description for this filter.
6. Click **Save**.

7. Select groups that should be listed as values in this filter and click > to move them to **Assigned Partner Group(s)**.

8. Click **Save Changes**.

Maintaining Group Filters

1. Click **Filters | Group Filters**.

2. Take one of the following actions.

To …	Do this …
Delete the filter.	Click the **X** in the Delete column. The filter is immediately deleted.
Change the filter name, description, or partner group list.	Click the filter's pencil in the Edit column.
Change the filter's partner group list.	Click the group's pushpin , pencil, or name.
Add a new filter.	Click **Add new row** below the list of filter names.

Settings

The Settings menu includes a number of administrative activities under these tabs:

Event Log See page 32	Displays a sortable list of various types of system events.
Document Fields See page 33	Lets you pick which additional fields are stored in the BCI database for each transaction set.
General Settings See page 35	Lets you set password requirements, enable or disable partner IDs, and set the default date range for the Transmissions page.
External System Setting See page 35	Lets you define external systems that will send data to BCI. Instream is set up for you.
About	Provides copyright information for BCI and other software as needed.

Event Log

You can see system events under **Settings | Event Log**.

Under this tab, use the options at the top to filter the list:

All All system messages.

Alert Log of BCI alerts that have been sent.

Error System errors (not EDI data errors).

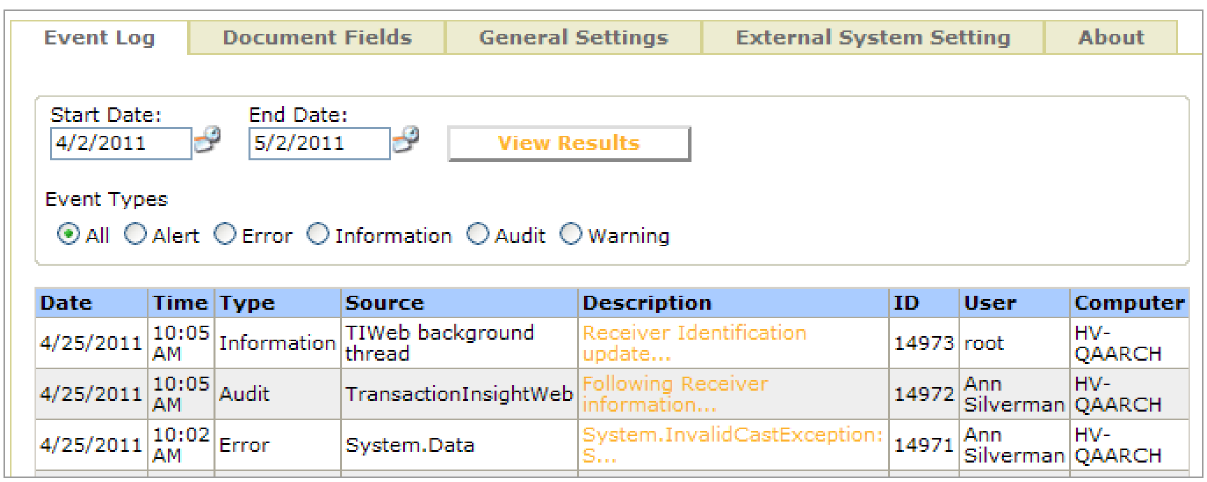
Information System informational messages.

Audit Various BCI user actions (user logons, pages viewed, etc.). You can enable tracking of these events with this Web.config setting:
`<add key="Auditing" value="true" />`.
Note: it greatly increases the size of your event log.

Warning System warnings.

Using these pages:

- Click an event's Description to see more information.
- See previous events by clicking the numbers at the bottom right.
- Re-sort the list by clicking on any heading.
- Use the date fields to select a range of items to download or delete.

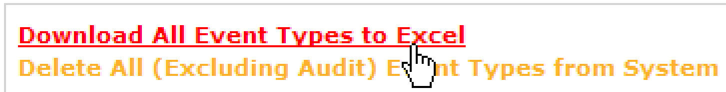


Periodic Administrative Tasks

To archive event log entries:

1. Select a date range and event type at the top of the Event log.
2. Click **View Results**.
3. At the bottom of the log page, click **Download** *type* **Event Types to Excel**.

Example:



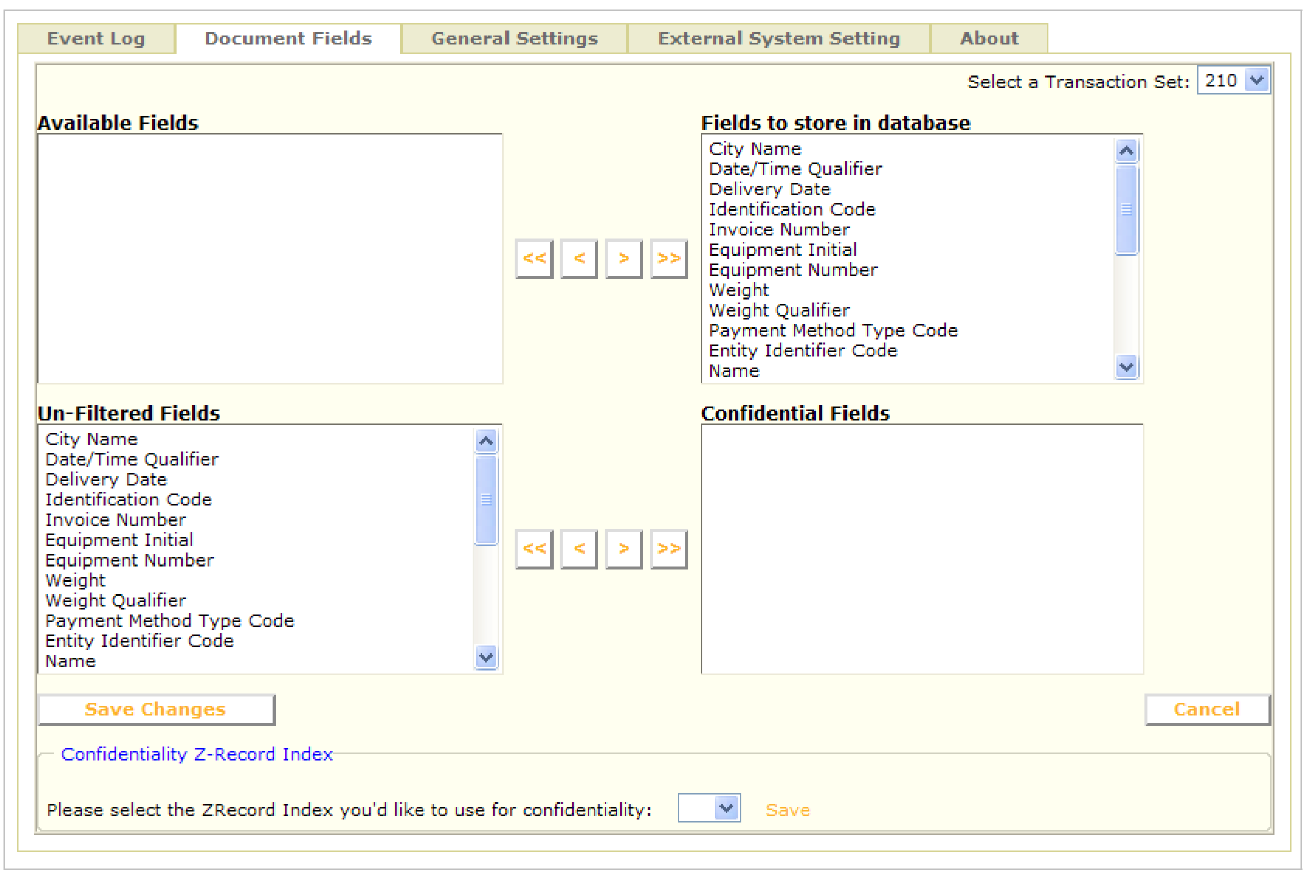
To delete events:

1. Archive them first if you'd like.
2. Select a date range and event type.
3. Click **View Results.**
4. At the bottom of the log page, click **Delete** *type* **Event Types from System**.

Example:

Document Fields

For each transaction set, you can pick which fields are stored in the BCI database as well as which fields are to be filtered for confidentiality.



Fields to be stored in the database

You can pick which fields are stored in the BCI database for each transaction set.

Documents coming in to BCI in the future will have the chosen information stored in the database.

1. Under **Settings | Document Fields**, select the transaction set in the upper right corner.

2. Move fields by selecting them and using the arrow buttons to put them where you want them to be.

   Those in **Available Fields** are not being stored in the database and cannot be displayed in BCI.

   Those in **Fields to store in database** are being stored and users can display them with Choose Fields on the Transmissions page.

3. Click **Save Changes**.

These fields are not searchable under **Search | Documents**.

Fields to be filtered for confidentiality

You can pick which fields are to be filtered for confidentiality. Documents coming in to BCI in the future will have the chosen information filtered.

1. Under **Settings | Document Fields**, select the transaction set in the upper right corner.

2. Move fields by selecting them and using the arrow buttons to put them where you want them to be.

   Those in **Un-filtered Fields** are not being stored in the database and cannot be displayed in BCI.

   Those in **Confidential Fields** are filtered and users cannot display them with Choose Fields on the Transmissions page.

3. Click **Save Changes**.

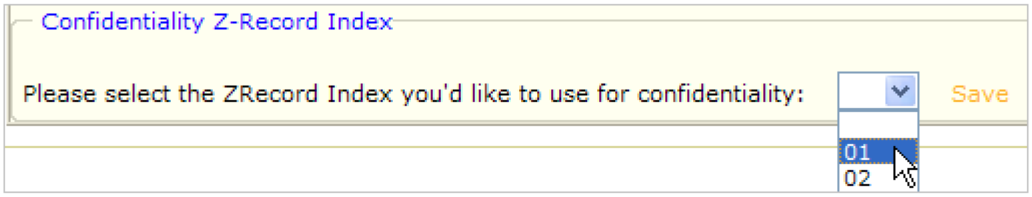
Z-Record index to be used for Confidentiality

Important: The use of Z-Records (also known as Custom Records) must be set up with the support of TIBCO Foresight. Please contact your TIBCO Foresight representative for more information.

To specify a Z-Record index to be used for Confidentiality:

1. Use the drop down menu to select the desired index.

2. Click **Save**.



Documents coming in to BCI in the future will have the chosen information filtered.

These fields are not searchable under **Search | Documents**.

General Settings

Password options

See Expiration and password minimum complexity on page 5.

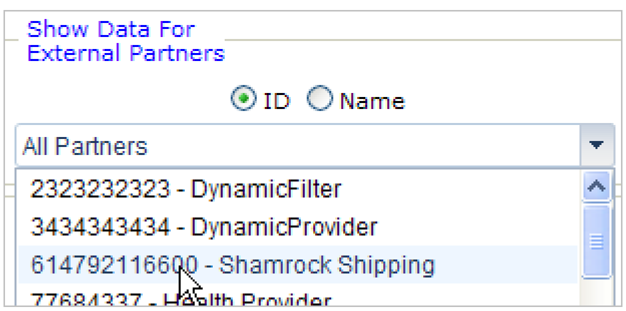
DefaultDateRange

Under Transmissions Date Range, type the default number of days to display on the Transmissions page.

IsExternalIdentifierUsed

If On, users can choose to sort external partner filter values by ID as well as by name.

ID is selected here and the list is sorted by ID, which is now in the first column:



IsInternalIdentifierUsed

If On, users can choose to sort internal partner filter values by ID as well as by name.

External System Setting

The External Systems Setting tab is for future use

My Account

All users can use **My Account** on the left menu. This lets them reset their password, change e-mail frequency, and share their own Filter Views.

Details are in **BCIUser*nn*.pdf**.

If they cannot log in, you can log in as administrator and reset their passwords under the Users page.

4 Managing BCI Statistics and Files Pages

Overview of BCI Pages

The BCI pages under Statistics and Files are for users, but the administrator is responsible for setting up these pages to give users what they need.

The following sections briefly describe what an administrator can do with each page and points to information that shows how to do it.

The following sections briefly describe what an administrator can do with each page and points to information that shows how to do it:

- Managing the Statistics Pages (page 38)
- Managing the Files Pages (page 39)

Managing the Statistics Pages

Item	Where to Look for Information	Page Affected
Internal Partners External Partners	Set Partner Type under the **Partners** page. Use Edit or Add New Partner. See page 13.	Documents Errors Document Volumes Success Rate Transmissions
Partner Filters	Create or edit a partner filter under the **Filters** page. Control which partners are included in the partner filter under the **Partners** page. See page 25.	Documents Errors Document Volumes Success Rate Transmissions
Partner Names	Change partner names under the **Partners** page. Edit the partner with the erroneous name. To correct the names of partners with names like [SENDER_3] or [RECEIVER_1], see Moving Data to the Correct Sender or Receiver on page 42.	Documents Errors Document Volumes Success Rate Transmissions
Can user X see this page?	Under **Users**, edit user *X* and note the Assigned Roles. Under **Roles**, edit the role and check its permissions.	Documents Errors Document Volumes Success Rate Transmissions
Which partners' data can a user see?	Under Users, edit the user and note the Assigned Partner Groups. They must be in a group to see data. If they have All Partners, they can see all data. Adjust under Partners | Partner Groups | Assign Partners.	Documents Errors Document Volumes Success Rate Transmissions

Managing the Files Pages

Item	Where to Look for Information	Page Affected
Can user X see this page?	Under **Users**, edit user *X* and note the Assigned Roles. See page 23. Under **Roles**, edit the role and look at the permissions selected under **Files**.	Upload View
Where can user X upload or view?	Under **Users**, edit user *X* and note the Assigned Partner Group(s). Under **Partners | Partner Groups**, edit a partner and choose the folders tab.	Upload View

5 Appendix C - Partner Assignment Errors

Why Data Gets Assigned to the Wrong Partner

If data is being assigned to the wrong partner, or if you cannot find results that you expect, suspect one of these conditions:

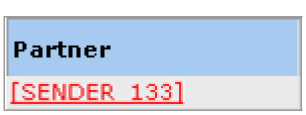
- The data matches no partners, so BCI made up a new partner named SENDER_*nnn* or RECEIVER_*nnn*.
- The data matches two or more partners, and is assigned to one of them but not necessarily to the one that matches most closely.
- The data matches only one partner, but it is not the one you wanted it to match.

Data that does not Match any Partners

When you have a new internal or external partner, be sure that they are set up in BCI before importing their data.

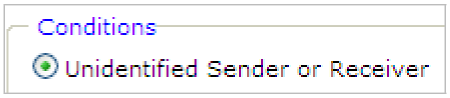
When BCI sees data that it cannot identify as belonging to a partner, it never guesses. Instead, it makes up a new partner with a name like this:

SENDER_133 or RECEIVER_212



BCI uses this method so that you can decide which partner should be assigned the data.

On the Alerts page, you can set up notification when data comes in with an unknown sender or receiver.



When you notice this happening:

1. Identify and fix the reason that BCI assigned it to the wrong partner as described in Diagnosing Partner Assignment Errors on page 46.

2. Move the data to the correct partner as described in Moving Data to the Correct Sender or Receiver below.

3. Delete SENDER_*nnn* or RECEIVER_ *nnn* from the main Partners tab.

Moving Data to the Correct Sender or Receiver

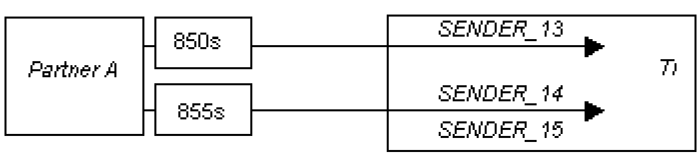
Check **Partners | Senders** or **Partners | Receivers** for the partner that is wrong. Look at the values that BCI used to identify the data to tell which partner should be assigned the data.

You can move *all* data from one partner to another, but you cannot pick out individual documents to move.

Caution: This will permanently move existing data to the new partner.

Examples

The examples in this section assume we did not set up a way for BCI to identify data as being sent by Partner A. Therefore, we now find that 850s sent by Partner A have been assigned to SENDER_13, and 855s sent by Partner A have been assigned to SENDER_14 and SENDER_15:



We need to:

1. Create Partner A in BCI.

2. Move data from temporary SENDER_13, SENDER_14, and SENDER_15 to Partner A.

3. Define what values BCI should use in the future to identify Partner A data.

If the Partner does not Exist

When data is assigned to the wrong partner, if the partner that should be assigned the data does not exist on the main Partners page:

1. From the main **Partners** page, edit the partner that was assigned the data.

   You may need to check the **Senders** or **Receivers** tab to determine this partner's name.

2. Change the **Partner Name** and other information to describe the new partner.

3. Click **Save Changes**.

   You should now see the changed name in the Partners list. The data that was assigned to the wrong name is now assigned to the new partner. Under the Senders and Receivers tabs, the name has also been changed.

4. Go to the Senders or Receivers tab and edit the values in the new partner's route as described in Identifying partner data on page 15.

Creating the Correct Partner

Before you can route data to a partner, the partner must be set up on the main Partners page.

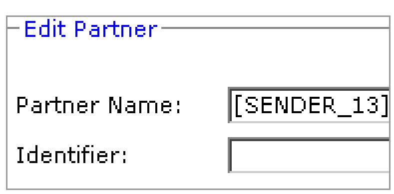
Go to the **Partners** tab of the Partners page and see if the partner exists. If not, set it up in one of two ways:

- Use the **Add New Partner** link at the bottom.
- Edit one existing incorrect partner that is getting the data and change its name.

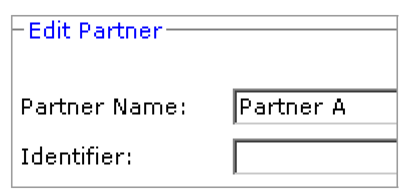
Example:

Since we know that Partner A's data is erroneously being assigned to SENDER_13, we can edit SENDER_13 and change the information to describe Partner A:

Before



After



After saving your changes, the partner name is changed and the data is now assigned to the new partner name.

Moving Data to the Correct Partner

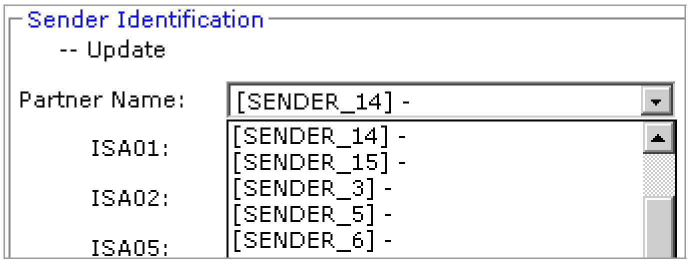
Once a partner has been defined, you move data to it:

1. Go to the **Senders** page.

2. Edit the sender to which the data is erroneously assigned.

3. Under Partner Name, select the name of the partner that should have gotten the data.

   Example:



4. Save. Answer **Yes** to the question about converting data.

   The partner name is now changed and the data that was assigned to it is assigned to the new partner name.

5. Repeat for each sender where the data is erroneously assigned.

6. Go to the Receivers page and repeat the process.

Checking the Values that Identify the Correct Partner

Once all data has been moved to the correct partner, check the lists under the **Senders** and **Receivers** tabs. These are routing conditions that will assign future data.

1. Be sure that one of them uniquely identifies the partner as a sender or receiver, and does so as broadly as possible. You may have to edit one of the lines and adjust the values.

2. If there are multiple lines for the partner, delete the unnecessary ones.

   This does not delete data. It has already been re-assigned.

   Keep in mind that the partner may need more than one line to route all of its data properly.

Example

Notice that Partner A has three lines, and they are all are needlessly restrictive.

Partners | Receivers | Senders | Partne

Partner: Partner A

Partner Name	ISA01	ISA02	ISA05	ISA06
Partner A	00		ZZ	PARTNERA
Partner A	00		ZZ	PARTNERA
Partner A	00		01	PARTNERA

We edit one of them to include asterisks in all fields except the ones that have specific values identifying Partner A.

Partner A	*	*	*	PARTNERA

We then delete the other Partner A lines unless we need them to identify other Partner A data.

Checking Moved Data

BCI moves data between partners in a background process so that you can continue to work while it updates a number of tables in the database.

To see the results of the move:

1. Under **Settings | Event Log**, choose **Informational**.

2. Look in the **Description** column for **Sender identification updated** or **Receiver identification updated**.

3. When that appears, the database has been updated and you can delete the unwanted partner that used to have the data.

If several hours pass and you cannot find the message under Informational, select **Errors** and see why it failed.

Deleting Unwanted Partners

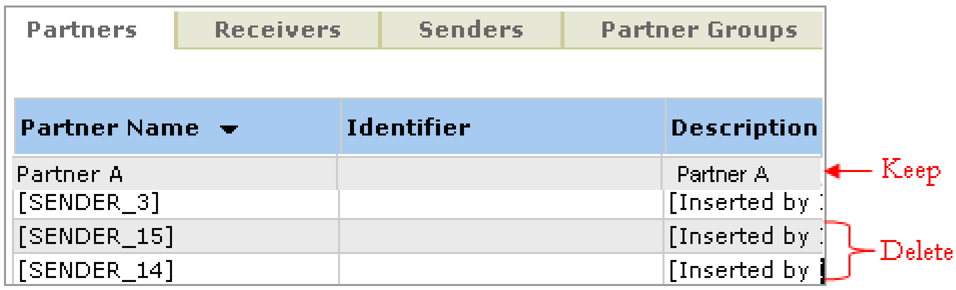
Caution Never allow anyone to edit your BCI database directly to delete or modify any data. This can cause permanent damage and Foresight may not be able to help you recover.

After an informational message in the Event log indicates that data has moved from the wrong partner to the right one (see Checking Moved Data on page 45), you can you can delete the unwanted partner:

1. On the **Partners** tab, find the partner.
2. Click **Delete**.
3. Click **Yes**.
4. Look at the top of the page to see the confirmation message.

Example

In our example, SENDER_13 has been renamed Partner A, and data has been transferred from SENDER_14 and SENDER_15 to Partner A. We can therefore delete SENDER_14 and SENDER_15.



Diagnosing Partner Assignment Errors

Once you have found which partner was erroneously matched to the data:

- Check the partner that got the data
- Check the partner that should have gotten the data
- Check the data itself to see if it contains the correct identifying information

Data that is assigned to the wrong partner is often caused by incomplete or erroneous information under **Partners | Senders** or **Partners | Receivers**. The problem can be with the partner who erroneously got assigned the data or the partner that erroneously did not get assigned the data.

If data is assigned to the wrong sender/receiver or to an automatically created partner like SENDER_133 or RECEIVER_212, check for these conditions:

1. Go to the **Partners | Senders** or **Partners | Receivers** tabs and check the partner that should have gotten the data.

   Be sure that the partner has a Sender and a Receiver page with values defined.

   Be sure the values completely and uniquely identify this partner's data and do not match data for any other partners.

2. Check the partner that actually got the data.

   Be sure the values entered are not too general. They must completely and uniquely identify this partner's data and not match data for any other partners.

When BCI finds a partner that matches:

- It assigns the data to that partner
- It does not continue checking all possible partners for the best match
- It may check partners in a different order than you see on the BCI web page

Tips:

- A blank for a value on the Senders or Receivers tab means that only a blank value will match.
- An asterisk means that any value will match the field. Do not use all asterisks.
- Be sure that partners have Senders and Receivers information defined before BCI handles data for them.
- Keep in mind that a partner can have multiple entries on the Senders and the Receivers tabs.
- Be sure that you have set up a sender and receiver for all data that passes through BCI.

  This includes a sender and receiver for all internal partners.

  Example: if Metro Suppliers Company is hosting BCI, you might set up a sender and a receiver called METRO.

6 Appendix D - Permissions

User Permissions

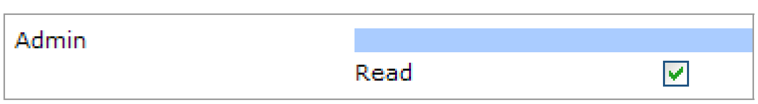
All users of BCI applications get access to My Account. Other permissions have to be granted through Roles. You will see some or all of these choices, depending on what permissions your current user has.

Access the permissions from the Common Admin component using **Roles | Permissions tab**.

If a user has no permissions, they will see this message when they logon:

```
The User does not have permission to access. Please contact your web
administrator if you think you have received this message in error.
```

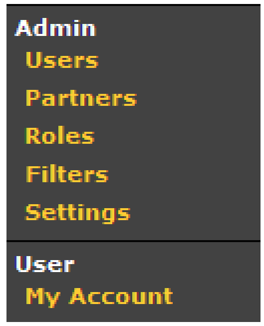
Admin Permission



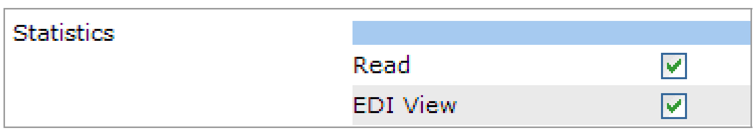
Components Affected	Common Administration
Usually granted to	BCI administrators

Effect

Read Allows access to all pages under Common Administration.



Statistics Permissions

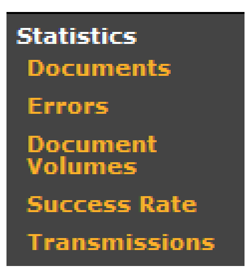


Components Affected BCI

Usually granted to BCI users and administrators

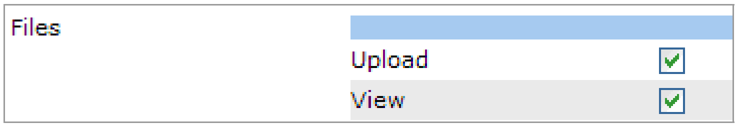
Effect

Read Allows access to all pages under the Statistics label on the left menu.



EDI View Allows user to view the actual EDI. See on page 53.

Files Permissions



Components Affected BCI

Usually granted to Users who upload or view files.

Effect

Upload Allows access to the Upload page, where users can upload files to specified directories on the web server if their partner group has upload folders set up.

View Allows users access to the View page, where users can view files stored on specified directories on the web server if their partner group has view folders set up.

7 Appendix E - Administrator's Guide to Forms

Overview

You can use forms to view documents containing errors. You cannot edit forms, although you can expand and collapse sections for ease of viewing.

Opening a Form

Form data is available if:

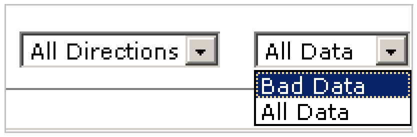
- EDI data was submitted to BCI, not just detail results from validation
- Errors were found
- The data was imported with Importer's savegooddata option

Form data is available through the Transmissions and My Tasks pages.

Transmissions Page

Users can view forms from the transmissions page.

1. Choose **Bad Data** at the top:



2. Click **Show Summary** to refresh the page.

3. Click the date link in the Date column.

4. Click the plus sign to open the transmission.

   Inside the ST level, look in the **Number of Errors** column to find a document with errors.

5. Click the number in its **DOC #** column to see its summary.

6. Choose **Click here to view the document**.

   The user must have a role with permissions that allow access to Statistics and must have Form View Level that lets them see the form fields).

Globally Controlling Message Levels on Forms

By default, forms display error messages only. To display other levels of messages, use the FormErrorCategoryThreshold setting in Web.config.

If you set this to Warning, all 5010 forms will show a warning icon instead of the red X.

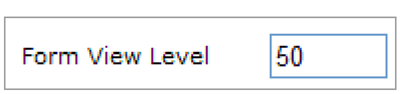
Controlling a User's Access to Form Fields

Giving Form Permission to a User

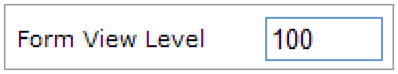
A users' access to form data is determined by their:

Role Assignment	Determines what form fields the user can view through Transmissions

A user with the following role can view data in each form field with an access level less than 50, and edit any field with an access level less than 3.



This gives access to all fields:



These field access levels are set up in the form's xml file.

Setting Access Levels for Form Fields

BCI initially gives users the ability to view all form fields.

As administrator, you can change the view levels for individual fields. To do this, edit the XML files listed in EdiForms\ EdiAccessControl.xml.

Levels can range from 1 to 99, with 1 being the least restrictive and 99 being the most restrictive.

EdiAccessControl.xml

Location	environment's Demo\TIWeb\EdiForms directory.
Transactions affected	Any.
Tag controlling access	EdiElementAccess

Example

```
<EdiElementAccess Reference="//_850/SAC/SAC01" View="50"/>
```

This restricts the SAC01 element for 850 transactions.

Those who have a role with form view permission *greater than* 50 can view this data on a form.

Unless an item is listed in this file, anyone with access to the form can view and/or edit its data.

You can edit this file and add restrictions. Your edits go after **-->** in an **EdiElementAccess** tag. It has this format:

<EdiElementAccess Reference="*location*" View="*n*" />

Where:

Attribute	Explanation	Examples

Reference	Location of data
	
	Items starting with a number should be preceded with an underscore:
	
	`_850` needs underscore
	`BEG` no underscore
	
	Two slashes // mean to search all descendants to find this item
	
	One slash / means to search the immediate children of the current level to find this item
	
	If the location does not point to a specific element, all descendant elements of the location are included
	
	It is a good practice to always specify the transaction except for enveloping
		`“//_850/BEG/BEG01”`
		
		This controls access to the BEG01 within 850 forms, as follows:
		
		//_850 transaction (ST)
		/BEG segment
		/BEG01 element
		
		---------- ----------------
		
		`“//_850//_1200SAC”`
		
		This controls access to the entire 1200SAC loop in 850 forms.
		
		//_850 transaction (ST)
		//_1200SAC loop (uses // since preceding loop levels were omitted; note the underscore since 1200SAC starts with a number)
		
		---------- ----------------
		
		`“//_850//_1200SAC/SAC01”`
		
		This controls access to the `SAC01`within the 1200SAC in 850 forms.
		
		//_850 transaction (ST)
		//_1200SAC loop
		/SAC01 element

View	Users with View permission exceeding this setting can view this data on the form	`“50”`

8 Index

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