BusinessConnect™ Configuration for use with BusinessConnect™ Insight (BCI)

Contents

Purpose

This document is a reference for the technical team that is configuring settings on the BusinessConnect™ server for use with BusinessConnect™ Insight (BCI). BCI settings are detailed in BCI_Installation_Config100.pdf. (Located in BCIs TransactionInsight\Documentation directory.)

Overview

Instream-validated data files flow from the BusinessConnect server to the BCI server, where they are used to generate data for BCI's reporting capabilities. In order for this flow of data to occur, certain tasks must be performed on the BusinessConnect server.

Task 1 - Place Guidelines in the Proper Location

BCI provides the following guidelines to support validation by Instream:

- PDSAGM5010-210.std
- PDSAGM5010-810.std
- PDSAGM5010-820.std
- PDSAGM5010-850.std
- PDSAGM5010-855.std
- PDSAGM5010-856.std
- PDSAGM5010-860.std

These guidelines are delivered with the BCI software and must be moved to the proper location on BusinessConnect:

1. Access the following directory within the BCI release package:

   `Business Connect Insight\1.0.0\1.0.0 build 160\<32/64>bit\<AIX/NT>\PDSAGM5010.zip`

2. Unzip the PDSAGM5010.zip file and place the contents in the following directory on the BusinessConnect server:

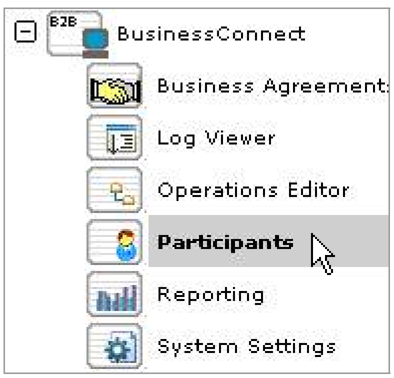
   `E:\tibco\bc\5.3\protocols\tibedi\instream\Database`

Task 2 - Create a BusinessConnect Participant for each Sender and Receiver

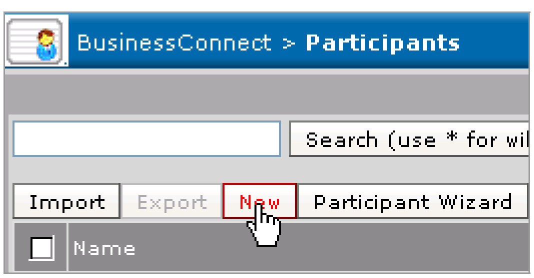
Before BCI can work with BusinessConnect, each BCI sender and receiver must be recognized by BusinessConnect as a Participant.

Access the New Participant Menu

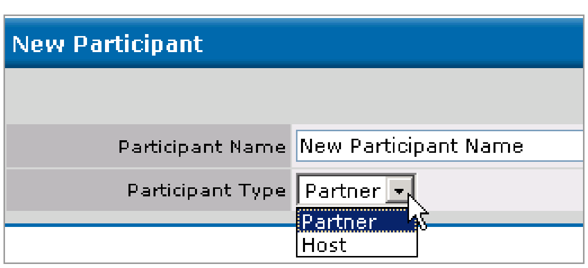
1. Access the BusinessConnect > Participants menu.



2. The BusinessConnect > Participants menu appears. Click the New tab.



3. The New Participant screen appears. Set up **each** BCI sender and receiver as a participant with type Partner or Host, as appropriate.



BCI Senders and Receivers are identified by information in the EDI as shown here:

The BCI term…	Refers to the entry at this location in the EDI…
Sender	ISA06
Receiver	ISA08

On BusinessConnect, a Sender or Receiver can be set up as either a Partner or a Host; there is no restriction. However, documents are routed based on the host being a sender or receiver, as shown here:

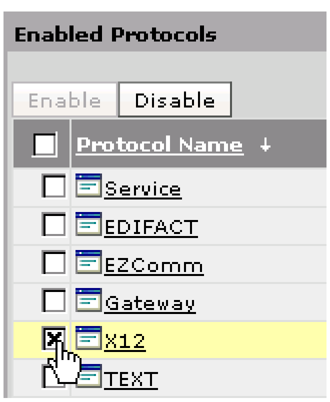
If the BusinessConnect Host is a…	Documents are routed to the…
Receiver	Inbound folder
Sender	Outbound folder

- For Participant type: Host follow the steps found in Add a New Participant of Type Host on page 3
- For Participant type: Partner follow the steps found in Add a New Participant of Type Partner on page 6.

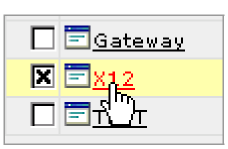
Add a New Participant of Type Host

Use this procedure to add a new participant of type Host.

1. On the New Participant screen enter the Participant Name
2. From the Participant Type drop down list, select Host and click OK.
3. The New Host Participant screen appears. Ensure that the Active box is checked. Select the Protocols tab.
4. The Enabled Protocols screen appears. Select the X12 checkbox.



5. Select the X12 link.

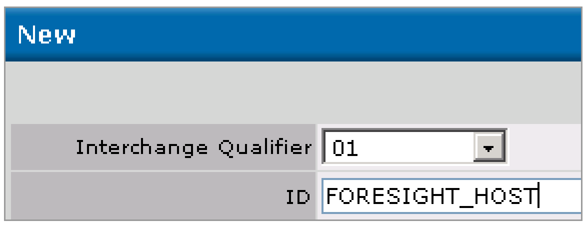


6. The Edit Enabled Protocol screen appears. Select the General tab.

a. Under Default Interchange Qualifier ID, select Add New.

b. The Interchange Qualifier ID List appears. Click Add New.

c. The New screen appears. Select the correct Interchange Qualifier and enter the proper ID (see table below). Click Save to save the new information.

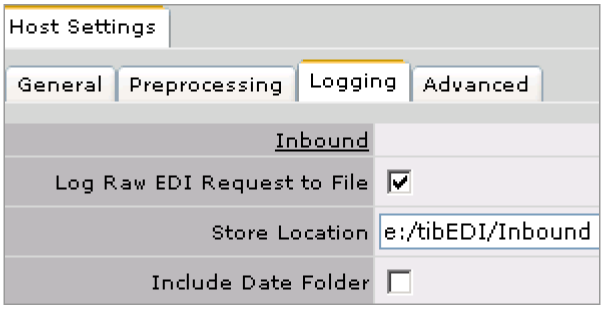


If the Host is a…	the Interchange Qualifier must correspond to the entry at this location in the EDI…	and the ID must correspond to the entry at this location in the EDI…
Sender	ISA05	ISA06
Receiver	ISA07	ISA08

d. Click OK to acknowledge that you've added a new ID to the Interchange Qualifier ID List.

e. The Edit Enabled Protocol screen reappears. Select the new Interchange Qualifier ID from the Default Interchange Qualifier ID drop down list.

7. Select the Logging tab. Ensure that the Log Raw EDI Request to File box is checked and the Store Location is set to e:/tibEDI/Inbound.

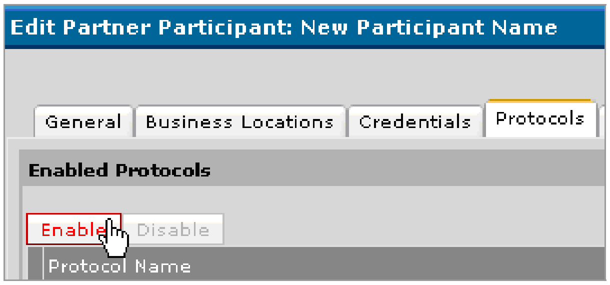


8. Click Save as appropriate for each of the open tabs until you have returned to the BusinessConnect > Participants main menu.

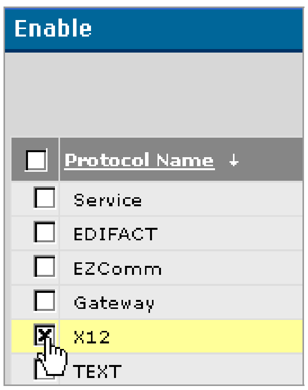
Add a New Participant of Type Partner

Use this procedure to add a new participant of type Partner.

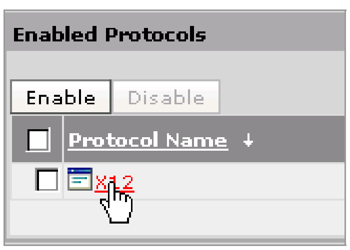
1. From the New Participant screen drop down list, select Participant Type: Partner and click OK.
2. The New Partner Participant screen appears. Select the Protocols tab.
3. The Enabled Protocols screen appears. Click Enable.



4. The Enable screen appears. Select the X12 checkbox and click OK.



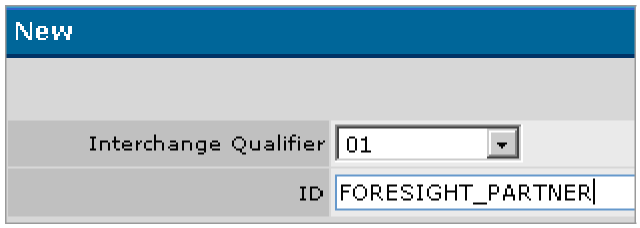
5. The Enabled Protocols screen reappears. Select the X12 link.



6. The Edit Enabled Protocol screen appears. Select the General tab.
   a. Under Default Interchange Qualifier ID, select Add New.

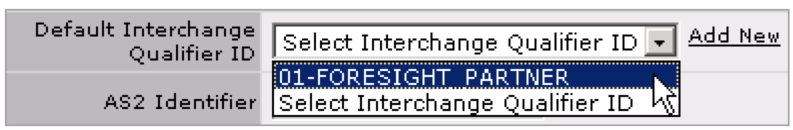
b. The Interchange Qualifier ID List appears. Click Add New.

c. The New screen appears. Select the correct Interchange Qualifier and enter the proper ID.



d. Click Save to save the new information and click OK to acknowledge that you've added it to the Interchange Qualifier ID List.

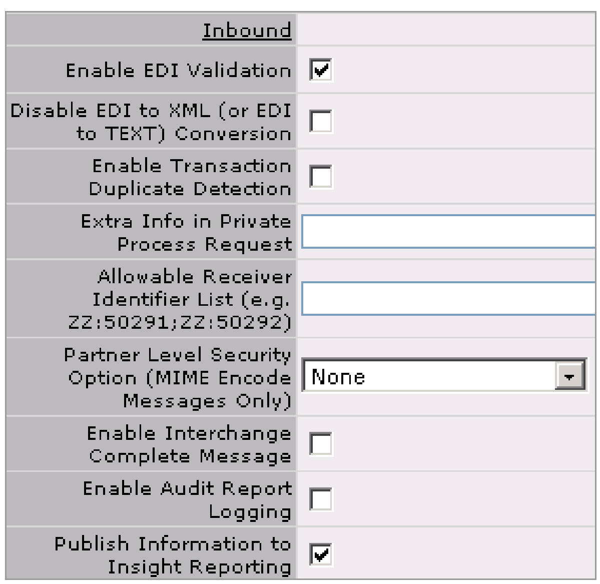
e. The Edit Enabled Protocol screen reappears. Select the new Interchange Qualifier ID from the Default Interchange Qualifier ID drop down list.



f. Under Inbound ensure the following boxes are checked:

- Enable EDI Validation

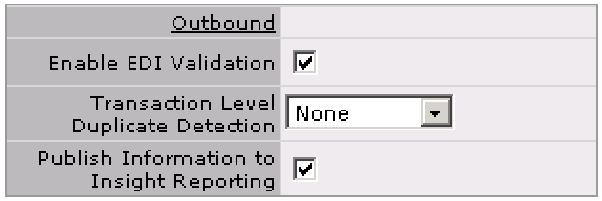
- Publish Information to Insight Reporting



g. Under <u>Outbound</u> ensure the following boxes are checked:

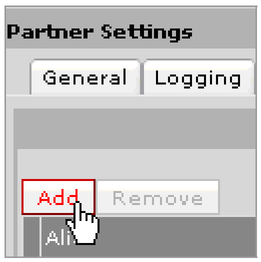
- Enable EDI Validation

- Publish Information to Insight Reporting

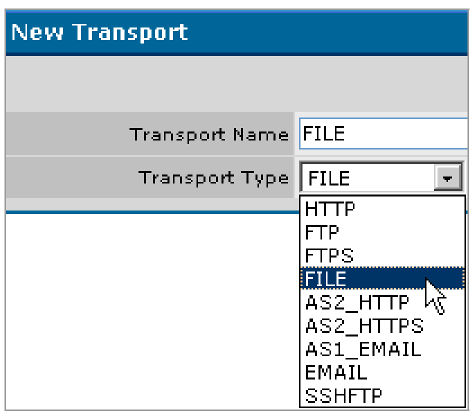


7. Select the Transports Tab.

8. The Partner Settings screen appears. Click Add.



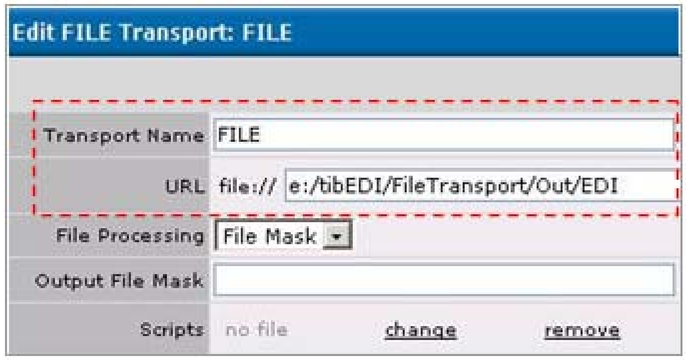
9. The New Transport screen appears. Enter the Transport Name as FILE and Select FILE from the Transport Type drop down list. Click OK.



10. The File Transport screen expands. Complete the following:

a. Ensure the Transport name is FILE.

b. In the URL field, specify a path where validated data will be stored. (**Note:** This location will be monitored by the TI-EMS Queue Reader, a component of BCI. You will need to refer to this path later in configuration, when setting up the Queue Reader.)



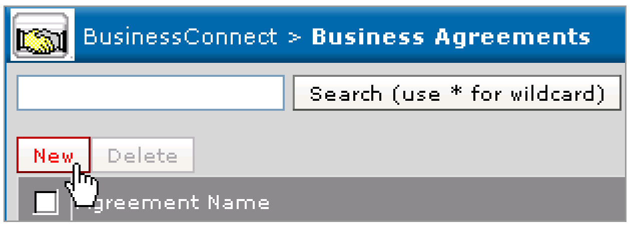
11. Click Save as appropriate for each of the open tabs until you have returned to the BusinessConnect > Participants main menu.

Task 3 - Create a Business Agreement between the Participants

After the sender/receiver participants are created, a business agreement must be set up between them so that they can exchange data.

1. Access the BusinessConnect > Business Agreements menu.

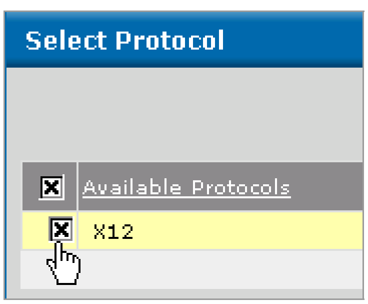
2. The Business Connect > Business Agreements menu appears. Select New.



3. The New Agreement screen appears. Select Host Party and Partner Party as appropriate and click OK to create a business agreement between them.

4. The New Agreement <*Participants*> screen appears. On the General tab, under the Protocol Bindings section, select Add Protocol Binding.

5. The Select Protocol screen appears. Select the X12 checkbox and click OK.

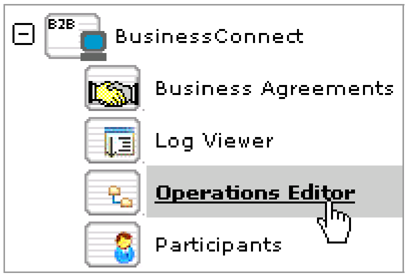


6. Click Save. You return to the Business Agreements menu.

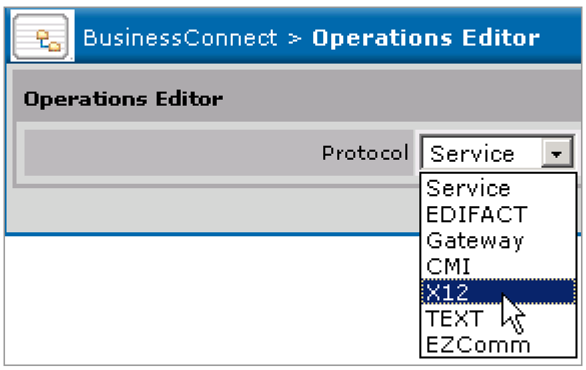
Task 4 - Configure the Operations Editor Protocol

Each transaction set to be used by with BCI must be listed as an operation and must be associated with the proper validation guideline.

1. Access the BusinessConnect > Operations Editor menu.

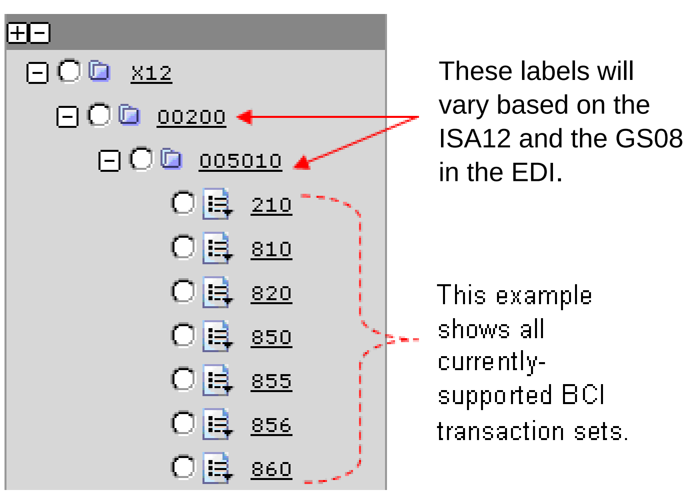


2. The Operations Editor menu appears. Select X12 and click Edit.

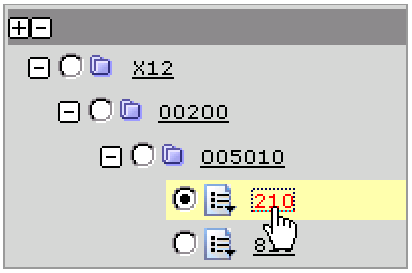


3. The Edit Operations screen appears. Expand the tree and ensure that the transaction set you want is listed. If it is NOT listed, refer to the BusinessConnect documentation for instructions on how to add a new transaction set.

   BCI supports the following transaction sets: 210, 810, 820, 850, 855, 856, and 860.



4. Click the link for the desired transaction set.



5. The Edit Notification Transaction: <*Set*> screen appears.

Under the Guideline tab, ensure that both the proper guideline and profile are being used for validation of the transaction set.

NOTE: See Appendix A – BusinessConnect and Validation and Appendix B – BusinessConnect and Validator Profiles for information about user created guidelines and APF files.

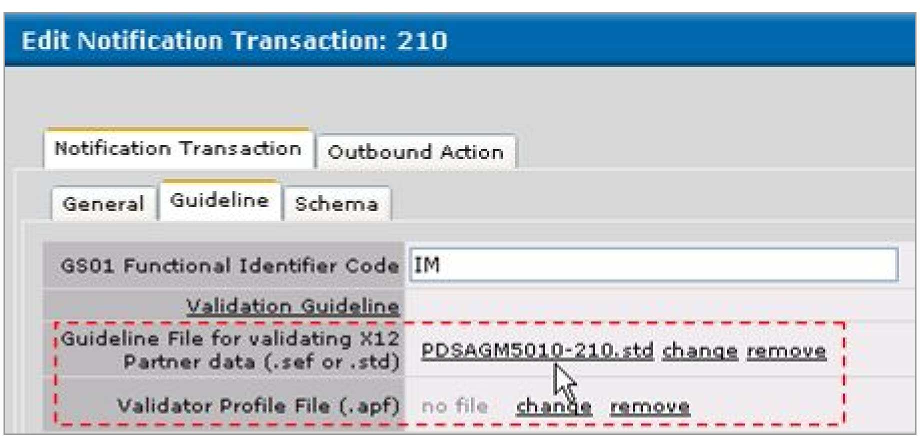
a. Verify that the Guideline File for Validating X12 Partner Data field is set to the desired guideline.

If the guideline is incorrect, click Change. The Change File screen appears. Choose Uploaded File from the drop down list and browse to select the proper guideline.

b. Verify the proper Validator Profile File (APF file) is being called. An entry of "no file" (recommended; as shown in the example) will call the default APF file provided for use with BCI.

To select a different APF file, click Change. The Change File screen appears. Choose Uploaded File from the drop down list and browse to select the desired APF file.

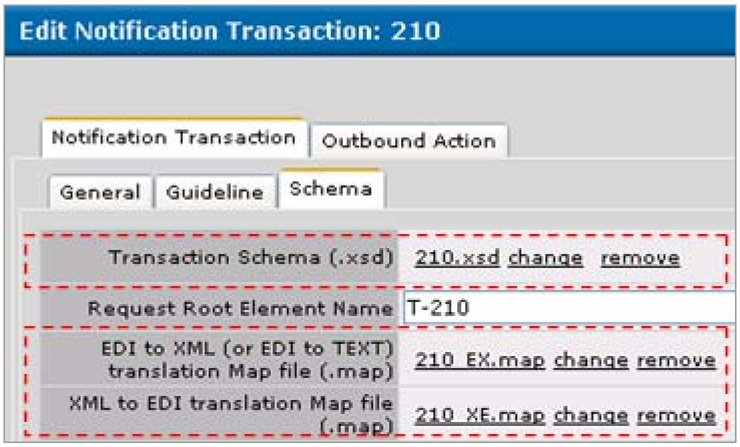
This is an example of the 210 transaction set pointing to the PDSAGM5010-210.std guideline, using the default APF file.



6. Under the Schema tab, verify that the correct schema and translation map files are being used. This information should populate automatically, based on the guideline specified (see Step 5a above).

   If this information is incorrect, click Change. The Change File screen appears. Choose Uploaded File from the drop down list and browse to select the desired file.

   This is an example of the 210 transaction set pointing to the 210.xsd and 210.EX and XE map files.



7. Click Save and Done until you return to the Operations Editor menu.

Task 5 – Perform BCI Installation and Configuration

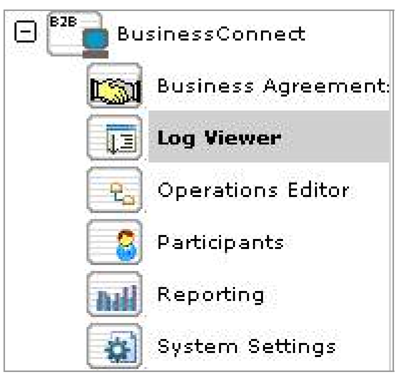
Before continuing with Task 6 in this guide, the following steps must be completed.

Step	Reference
Install and configure BCI software on the BCI server	BCIInstallation_Config.pdf (Located in BCIs TransactionInsight\Documentation directory.)
Configure other TIBCO Foresight components within BCI	
Install and configure TI EMS Queue Reader on the BCI server	TI_EMS_Queue_Reader.pdf (Located in BCIs TransactionInsight\Documentation directory.)

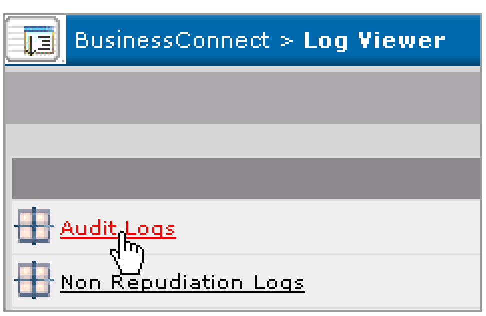
Task 6 – Use BusinessConnect Audit Logs to Confirm the Flow of Data

The best way to confirm BusinessConnect is set up properly for use with BCI and that data is flowing as it should be is to view the Audit Logs.

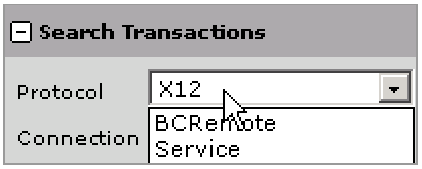
1. Access the BusinessConnect > Log Viewer menu.



2. The Business Connect > Log Viewer menu appears. Select Audit Logs.



3. The Audit Logs screen appears. Under Search Transactions, select X12 and other search settings as desired. Click Execute Query.



4. The Search Results appear. Use this log to view the flow of data and identify areas that may need correction.

Appendix A – BusinessConnect and Validation Guidelines

Customers using BCI with BusinessConnect are validating data using Instream and Response Generator, both of which are located on the BC machine. Customers may be using guidelines they have developed with BusinessConnect. To work correctly, Response Generator requires guideline modifications

Non-HIPAA X12 guidelines must have DSR marks added:

```
.OBJVARS

///GS//=GSSG

///ISA//=ISA1

/850//1//=STST
```

EDIFACT guidelines must have DSR marks added:

```
.OBJVARS

///UNB//=UNB

///UNG//=UNG

///UNH//=UNH1
```

If you are using EDISIM, refer to Using EDISIM Standards Editor (FSeditor.pdf), Chapter 10, the section “Creating Guidelines for Instream.” (Located in EDISIM\Documentation directory.)

Appendix B – BusinessConnect and Validator Profiles

A Validator Profile, commonly called an APF file, contains configuration information for Instream. Each time validation occurs, an APF file is read to determine what is to be checked and what is to be displayed on the screen or written to output files.

Instream provides a default APF file ($fsdeflt.apf in the Instream Bin directory). Users may choose to copy the default file and modify it, but the default settings for certain fields should not be changed.

If a custom APF file is being used, ensure the following fields within the APF file are set as shown here:

APF File Section	Setting
[Warning Allow]	WT_Error=1
	WT_Fatal=1
[Types Allow]	Type0=1
[Warning Levels] section	Ensure the severity values for 31990 and 31991 are set to 1 (informational)
[Detail Record Output	STRUS=1
	STRUE=1
	SVALU=1
	ZREC=1
	IDENT=1 (if Matching is used)

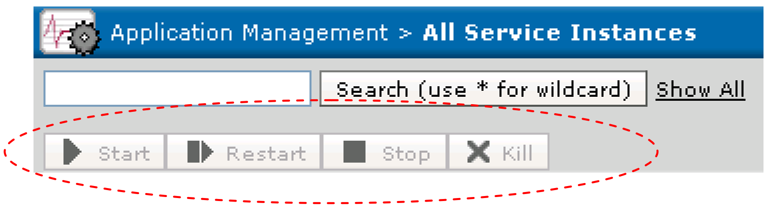
For complete details, refer to the Response Generator Technical Manual (ResponseGeneratorTechnicalManual.pdf), Chapter 1, the section “Validation Profile Settings to use for Response Generator.” (Located in Instream\Documentation directory.)

Appendix C – Troubleshooting

Starting/Stopping/Restarting an Application

Should the need arise, you can start, stop, and restart the application by accessing the Application Management > All Service Instances menu.

Use the tools on the menu as desired.



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Important Information