BusinessConnect™ Insight User Guide

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Important Information

Contents

1 Introduction

Overview

BusinessConnect™ Insight (BCI) lets you use a browser to view reports about EDI processing. This includes the number and types of transactions processed by date, error rates and types, and success rates. All of these can be filtered in various ways.

In addition, users with the appropriate permissions can view specific transactions at various levels of detail.

Your BCI administrator has given you access to the information that you need, while protecting the privacy of others.

2 Basics

Logging In

To log in to BCI:

1. Type the Email address and Password assigned to you by the BCI administrator. Your "Email" may not actually be an e-mail address.

2. Click **sign-in**.

To log off, click **Logoff** in the upper right corner.

Password Expiration and Deactivation

Expiration

Passwords expire periodically. After that, during login, a prompt appears for the old password, new password, and confirmation.

Your BCI administrator sets the password expiration interval, the number of days before you can use the same password, and the specific requirements of the password (capital letters, lower case letters, numbers, and special characters).

Deactivation

Your username is deactivated if:

- You enter three invalid passwords when trying to log in.
- You start to change a password and then do not finish.

If your password is deactivated, contact your BCI administrator.

Navigating

The main menu along the left side displays the pages that you can access. Depending on your permissions, your main menu will show some or all of these pages:

① The navigation bar along the top lets you go directly to previous levels. For best results, use this bar rather than the browser's **Back** button.

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

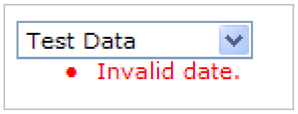
③ Adjust the date and press **View Results** to see different data ranges.

④ Use drop-down lists to filter the data.

⑤ You can sort some columns by clicking on their headings.

⑥ Links vary by page.

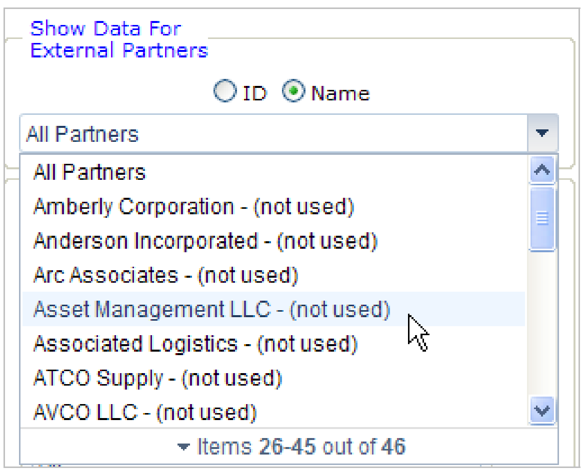
If you make an error on a page, BCI will display a red message at the top left.



A red asterisk marks the location of the error.

Selecting from a List

BCI has many drop-down lists like this one:



To find a selection that is not showing, you can:

- Use the scroll bar to scroll up or down.
- Click on the  arrow on the bottom border to display more entries at the bottom of the list.
- 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 Overview of Transmission Page Data on page 49.

Validation Dates

Most dates in BCI are validation dates. Examples:

Statistics pages	Start Date: 1/29/2009 End Date: 2/5/2009
Top Errors page	**Submission Date** / **Transmission** 1/29/2009 4:19:41 PM / Tutorial-C.edi 1/29/2009 4:19:41 PM / Tutorial-C.edi
Transmissions pages	**Date** / **# Bytes** / **# Transmissions** 1/29/2009 / 56740 / 6

Dates from EDI Data

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

Errors Page

Click **Errors**, click on an **Error Code**, and click a **Document ID**. You will see two dates for that document. The first one is the date and time from the detail results file:

Transmission Name: Amberly850-1.edi
Transmission Date: 5/5/2011 2:56 PM
Transaction Set: 850
Document Date: 4/6/2011 4:15 PM
Sender: Amberly Corporation
Receiver: RetailCo Corp.
Dollar Amount: $100.00

The second one is the date and time from a value within the transaction set:

Transmission Name: Amberly850-1.edi
Transmission Date: 5/5/2011 2:56 PM
Transaction Set: 850
Document Date: 4/6/2011 4:15 PM
Sender: Amberly Corporation
Receiver: RetailCo Corp.
Dollar Amount: $100.00

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:

Document Date	Number of Errors
1/16/2009 4:15:00 PM	3
1/16/2009 4:15:00 PM	4

The location of the document date varies by transaction. See Overview of Transmission Page Data on page 49.

Specifying Dates on Statistics Pages

The Statistics pages let you specify the dates covered by the reports.

Selecting the Date Interval

Click the Day, Week, or Month button:

Day	See data for up to 7 days.
Week	See data for up to 7 weeks. Weeks end on Saturday.
Month	See data for up to 13 months.

To update the page with the new interval, click **View Results, Search,** or **Show Summary**.

If the data for that interval and date range will not fit on the chart, BCI changes the interval and displays a message at the top left.

Typing a Date Range

1. Type the desired dates in the date area.

2. Click **View Results, Search,** or **Show Summary**.

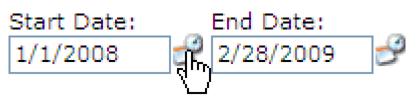
   If no error message appears at the top left, the page updates to show information for the dates you selected.

If you have selected Week or Month as your interval, results show the entire week or month, regardless of the ending day. Example: For monthly data, ending dates of 1-15-2009 and 1-30-2009 both show data for the entire month of January.

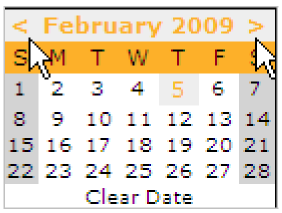
Selecting a Date from a Calendar

If a date is editable, you can open a calendar and pick a date rather than typing it:

1. Click the symbol at the right side of the date field.



2. Display the month by clicking the arrow to the right or left of the month.



3. Click the day.

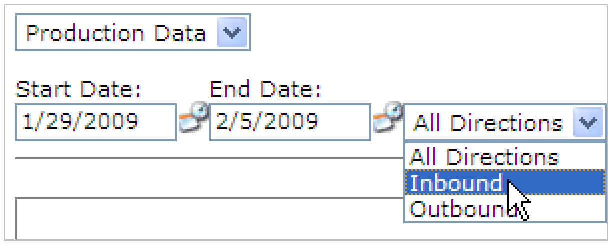
4. Click **View Results**, **Search**, or **Show Summary** to update the page.

The calendar control in BCI is provided by Excentrics World. Please see www.eworldui.net for details.

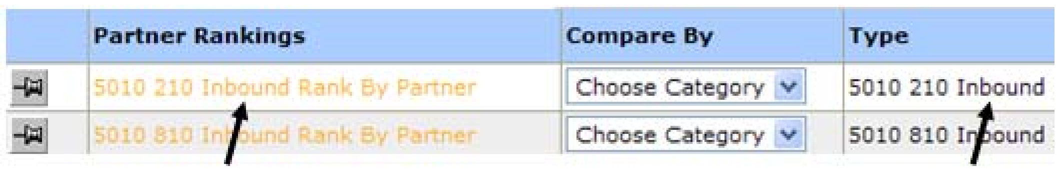
Inbound and Outbound Documents

BCI distinguishes between inbound and outbound 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.

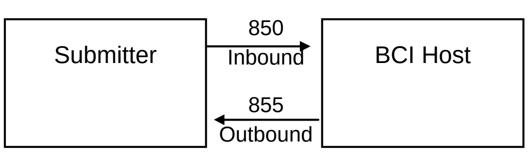
Outbound Data sent *from* the BCI host's organization.

It is not dependent on sender and receiver IDs and is not determined by reading ISA or GS values.

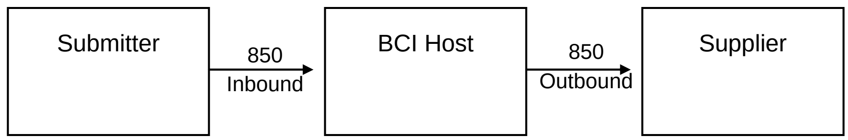
The host designates data as inbound or outbound by where it puts data awaiting importing into BCI. When BCI reads data from the inbound directory, it flags it as inbound. When it reads data from the outbound directory, it flags it as outbound.

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.



External and Internal Partners

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

Application Documents

Throughout BCI, you will see references to documents. These are the application documents within a transaction set.

Example

A file might contain 2 transaction sets. Each transaction set contains 30 documents.

This file therefore contains 60 documents:

	Partner Rankings	Compare By	Type	05/07/11
	5010 210 Inbound Rank By Partner	Choose Category	5010 210 Inbound	60

3 Statistics Pages

Overview of Statistics Pages

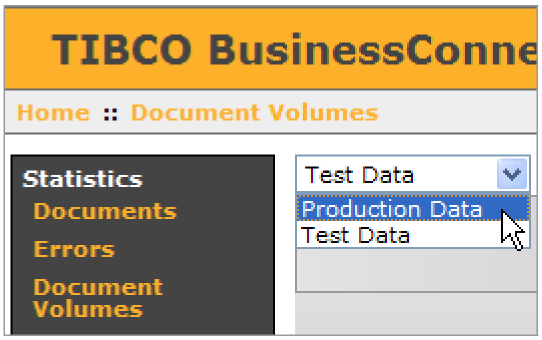
Your BCI administrator has given you access to the information that you need, while protecting the privacy of others. You should be able to see some or all of these statistics pages:

Information / Actions	Menu	See…
Document volume – number business documents	Documents	Reporting on Document Volume on page 19
Errors	Errors	Reporting on Errors on page 23
Document volume – number of good, bad, and total business documents.	Document Volumes	Reporting on Document Volume on page 19
Percentage of documents with no errors	Success Rates	Reporting on Success Rate on page 30
Transmissions per day – number of EDI files processed by day; data about each file	Transmissions	Reporting on Transmissions on page 31

Common Elements of BCI Pages

Test and Production Data

On each statistics page, you can see either test or production data. Set the filter at the top left:



BCI uses the contents of the ISA-15 to determine whether an interchange is test or production.

Technical note
A systems person at the host can use Importer's **t** parameter to force EDI data to be treated as test data, regardless of the data in the ISA-15. This affects future data being imported and is not retroactive to previously imported data.

Filters

All statistics pages have filters, which let you adjust the display to include only the data that you want to see.

To use filters:

1. Display the filters (see Displaying Filters below).
2. Select values for some or all filters.
3. Click **View Results**, **Search**, or **Show Summary** to update the page.

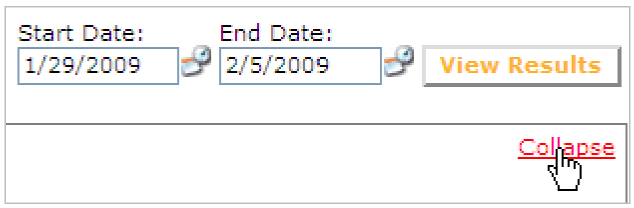
   Documents that match all filter values selected will be included in the display.

Displaying Filters

Locating the filters:

- On the **Documents**, **Errors**, **Document Volumes**, and **Success Rate** pages, the filters area is just below the graph.
- On the **Transmissions** page, it is at the top.

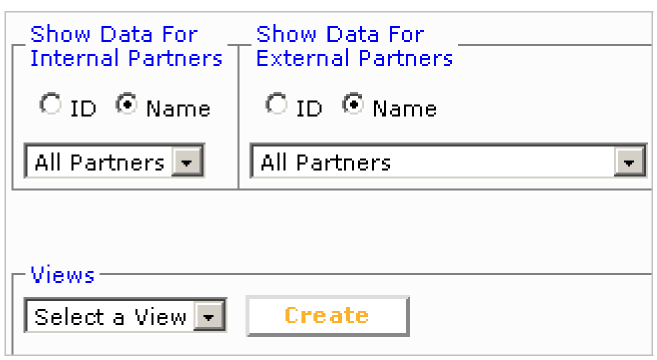
On many pages, you can display or hide the filters areas by clicking on **Collapse** and **Expand** to the far right:



Displaying Data for Individual Partners

When filters are expanded, you will see filters for internal partners and external partners. You may have more filters that have been set up by your BCI administrator:

Most pages with filters let you select an individual external and internal partner for the report.



The drop-down list will show all partners that you are allowed to see. Notice **All partners** at the top of each list. If IDs have been set up for your partners, you can use the buttons above the list to sort the partners by ID rather than by name. Erase the contents of the top line and type the first character of the name or ID to locate it faster.

To be included, a document must match your selections for Internal Partners AND External Partners.

For an overview of internal and external partners, see External and Internal Partners on page 10.

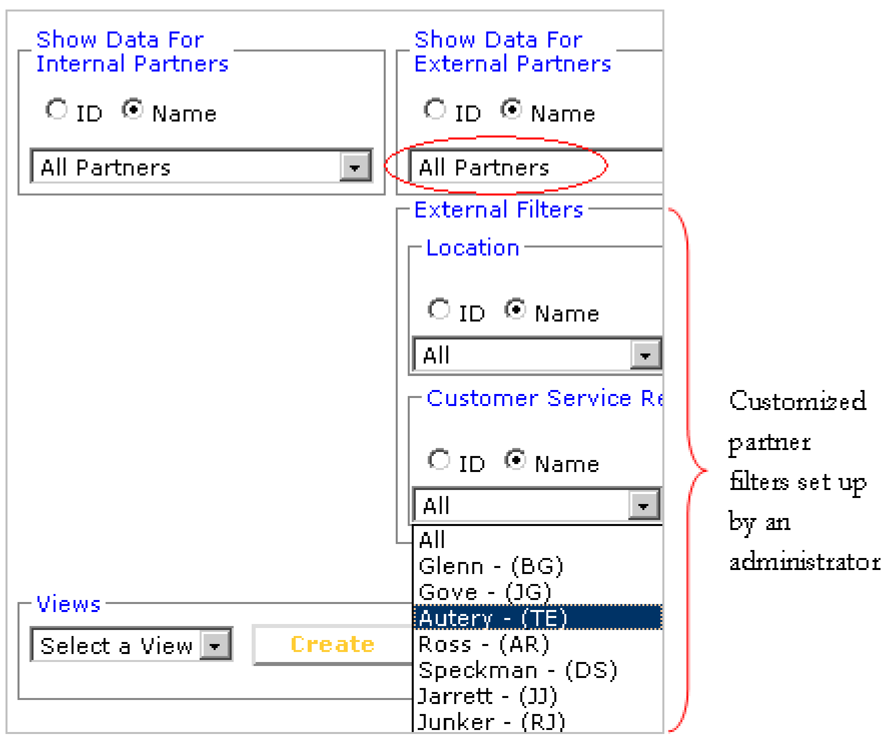
Displaying Data for a Group of Partners

Your BCI administrator may have set up filters that let you see data for a pre-defined group of external partners such as all suppliers, all partners in a certain state or region, etc.

For example, you might want to see success rates for all partners in your Midwestern region. Perhaps you have different programs in various regions and want to know which are most effective. Your administrator can set up filters to isolate data from certain groups of partners so that you can get targeted reporting.

On any statistics page, if you have External Partners set to **All Partners** selected for External Partners, then external filters set up by the BCI administrator will appear below it.

Select values from any or all Filters. After you press **View Results**, **Search**, or **Show Summary**, the page updates to show data for partners that match all filter values that you selected.



Saving a View

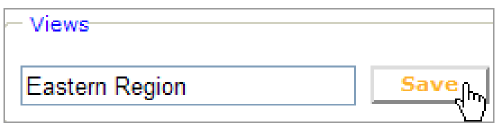
On statistic pages, you can save all filter value settings for future use by yourself and/or others in your group.

Saving a view

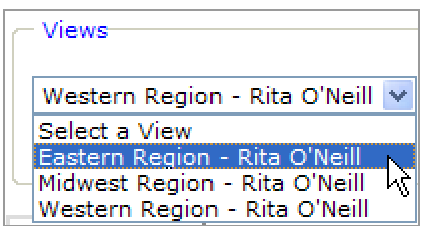
1. Select values for the filters inside the area that you can collapse and expand.

2. Under **Views**, click **Create**:

3. Type a name for your view and click **Save**:



You can select this view from any statistics page. Your name is appended to the view name to indicate who created it.

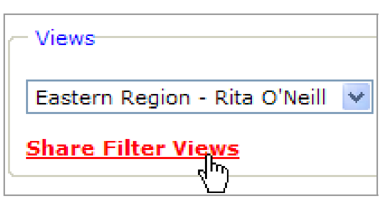


Sharing your saved view with others

You can share views that you create with others in your group or who have your role.

1. Select a view that you created.

2. Click **Share Filter Views**.



(If Share Filter Views is not available, go to the **My Account** page and select the **Filter Views** tab.)

3. On the My Account page, verify that the **Filter Views** tab is selected.

4. Select a group or role from the drop-down list.

   You can share with those with the same roles or groups as yours.

5. Under the Share column, select all views that you want to share with them.

6. Click **Save**.

7. You can repeat steps 4-6 for other groups or roles in the list, if you'd like.

When others share their views with you

To use their views

If someone else shared a view with you, it will show up in the Views list. You can select it to use the same filter settings that they had when they created the view.

To delete their views from your list

You are in charge of what appears in your view list. You can delete a view created by you or by others by selecting it and clicking **Delete**.

This affects your list only. Others who have this view will be unaffected.

Downloading to Excel

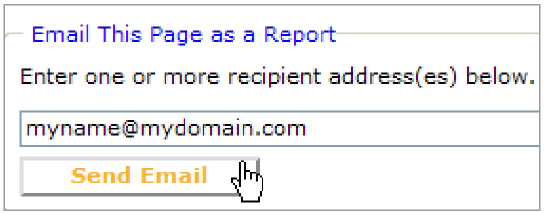
Statistics pages let you download their reports to Excel. Click the link at the bottom left:

It will then suggest a unique filename with a date-time stamp.

The steps you take after this will depend on which browser you are using. Typically, you will have a **Save** button or link where you can select a download directory and change the filename. Check your desktop if you are not offered a means to select a directory.

E-mailing a Report

To send a screen shot of any statistics page, minus the graph, go to the bottom of the page and use **Email This Page as a Report**. The report will display the filters so the recipient can see what data is included.



Reporting on Document Volume

The Documents and Document Volumes pages are identical, except the Document Volumes page has extra rows to show the good and bad document count as well as the total document count.

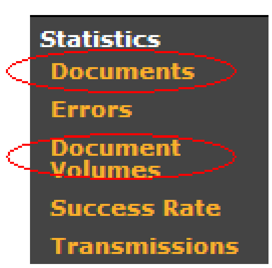
On these pages, you can:

- See the number of documents processed for each transaction type.
- See the number of documents of a specific transaction type for each external partner, in order of volume
- Choose date ranges for a report
- Filter a report in various ways

Data includes volumes of documents sent to or from all partners that you are authorized to see.

Opening the Documents or Document Volumes Pages

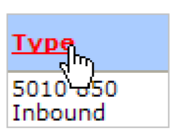
Click **Documents** or **Document Volumes** on the left.



Using the Main Documents and Document Volumes Pages

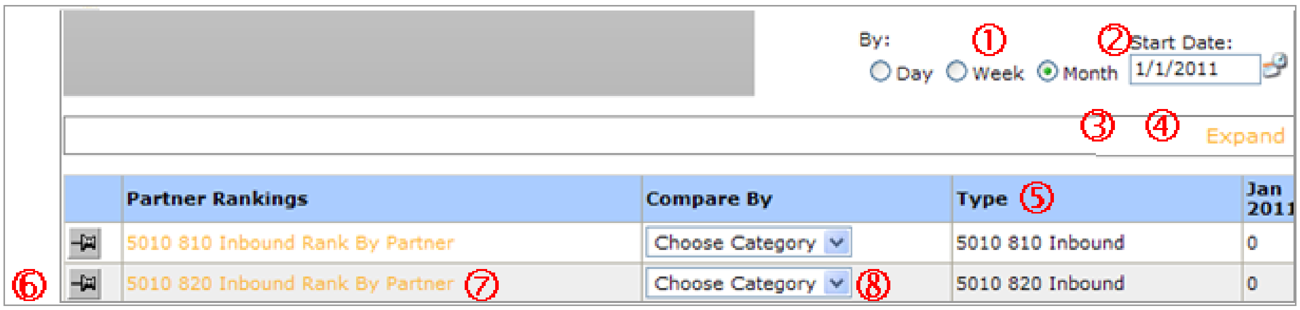
The main Documents and Document Volumes pages show the number of documents of each type that were been processed during a timeframe of your choice.

You can customize the display in these ways:

To do this …	Do this …	Number (see graphic below)
Change date interval	Choose Day, **Week**, or **Month**. Click **View Results**.	1
Change date range	Type the desired date in the **Start Date** and **End Date areas** to the right of the graph, or use the pop-up calendar. Click **View Results**. See Specifying Dates on Statistics Pages on page 8.	2
See volumes for one partner	Use internal or external partner filters (expand the filters area). The report shows document volumes for that partner. See Displaying Data for Individual Partners on page 15.	3
See volumes for multiple partners	Select from the partner filters or group filters (expand the filters area). See Displaying Data for a Group of Partners on page 16.	4
Sort the rows differently	Click on the column head that is to control the sort. A sortable column heading changes color when you rest your cursor on it: 	5
See volumes for one type of document	Click the pushpin button in its first column.	6
Compare volumes for individual external partners	Click a document in the **Partner Rankings** column. You will see volumes for all partners to whom you have access; note the filter settings.	7

To do this …	Do this …	Number (see graphic below)
Compare volumes for categories of external partners	Use that document's Compare By column to choose a category. See Comparing Volumes between Categories of Partners on page 21.	8

Main Documents and Document Volume Pages



Comparing Volumes between Categories of Partners

This feature is useful if you have access to multiple partners.

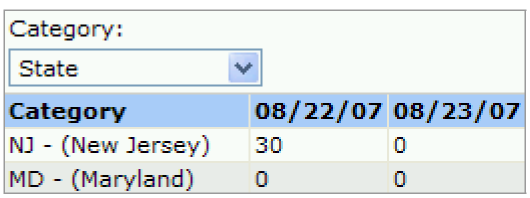
The BCI administrator may have set up categories of partners. If so, you can compare document volume within a category.

On the main Documents, Errors, Document Volumes, or Success rate page, use the arrow in the **Compare By** column to select a category.

Example

You are choosing the category type for 856 Inbound documents:

After selecting, you see the volumes for each division within the State category, a custom filter set up by your BCI administrator. This example has two divisions: New Jersey and Maryland. You can change category with the drop-down list above the chart.



Category	08/22/07	08/23/07
NJ - (New Jersey)	30	0
MD - (Maryland)	0	0

Categories offer the same divisions as Partner Filters, but they compare divisions rather than filter out data for just one division.

Reporting on Errors

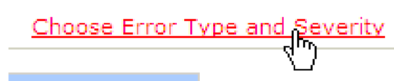
Click **Errors** on the main menu to understand the reasons for document rejection. On the Errors pages, you can:

- See errors in the order of frequency
- Filter for:
  - dates
  - transaction sets
  - individual partner
  - groups of partners
  - values within documents
  - a particular error type
  - a particular error number
- For each error number, see which application documents contained the error.
- Compare categories of partners for each error code.
- See summary information about an application document that has an error
- View an application document in a web form

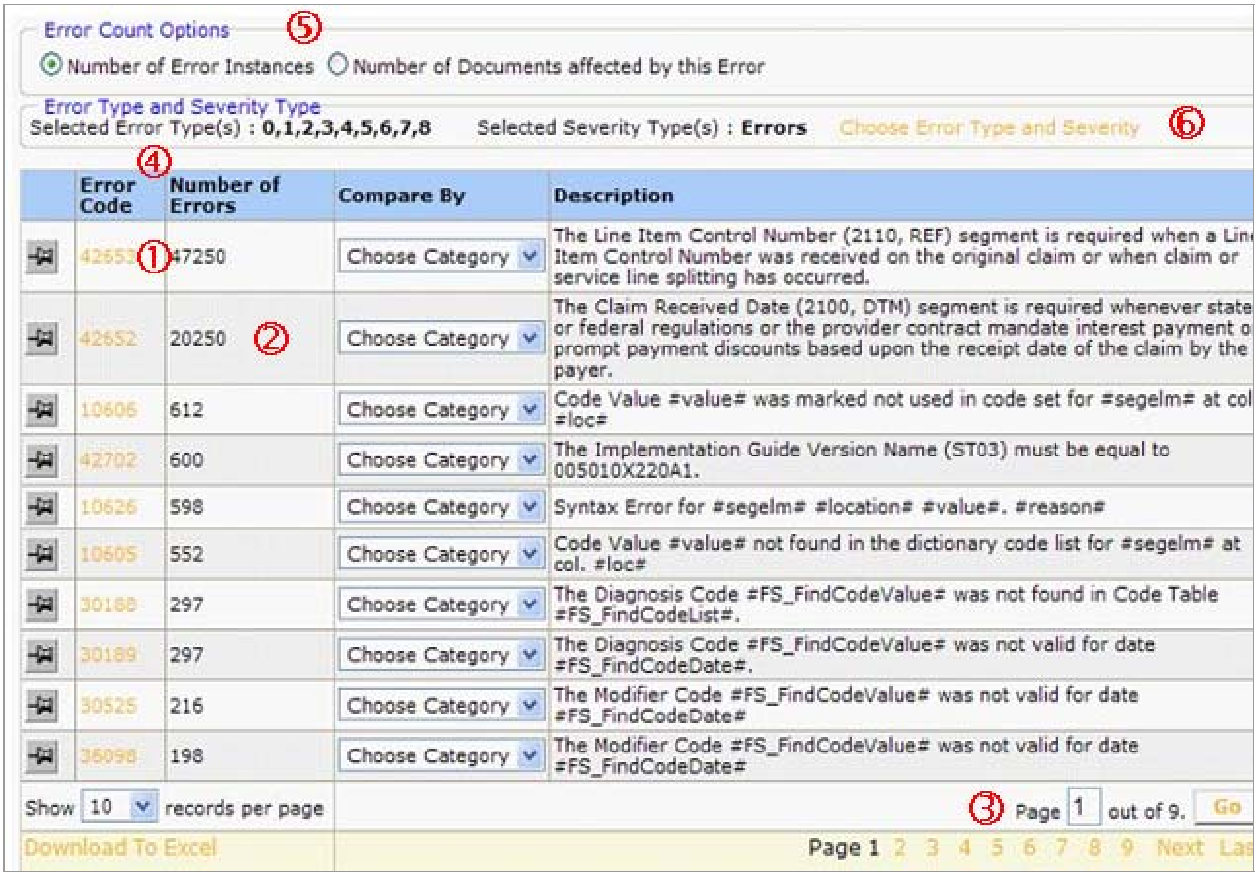
Using the Main Errors Page

The main Errors page shows the top 10 errors in documents processed during a timeframe of your choice.

To do this …	Do this …	**Number** (see graphic below)
Filter the data to include certain partners or certain documents	Use the filters (expand the filters area).	See Filters on page 14.
Change the date range	Type the other dates in the **From Date** and **To Date** fields below the graph, or select from the pop-up calendar. Click **Search**.	See Specifying Dates on Statistics Pages on page 8.
See which documents contain a specific error	Click the error number in the Error Code column, or the pushpin next to it. Scroll down to see the list of transmissions at the bottom of the page.	1

To do this …	Do this …	Number (see graphic below)
Compare categories of partners for each error code	Select the category in the **Compare By** column.	2
See other pages of errors	Click on another page number at the bottom right.	3
Sort the rows differently	On the errors list, click on the **Error Code** or **Number of Errors** column headings. Choose **Number of Error Instances** or **Number of Documents** affected by this Error. On the transmissions list for a specific error code, click on any heading.	4
Select number of errors or number of documents	What determines the ranking – the number of error instances or the number of documents containing errors?	5
Filter error type of severity	To select only one error type and/or one severity, click this link at the right side of the page:  **Technical note:** Your BCI administrator can include or hide these fields. It is controlled by IsTop10ErrorTypeSearchOn in Web.config.	6

Main Errors Page



	Error Code	Number of Errors	Compare By	Description
	42653	47250	Choose Category	The Line Item Control Number (2110, REF) segment is required when a Lin Item Control Number was received on the original claim or when claim or service line splitting has occurred.
	42652	20250	Choose Category	The Claim Received Date (2100, DTM) segment is required whenever state or federal regulations or the provider contract mandate interest payment o prompt payment discounts based upon the receipt date of the claim by the payer.
	10606	612	Choose Category	Code Value #value# was marked not used in code set for #segelm# at col #loc#
	42702	600	Choose Category	The Implementation Guide Version Name (ST03) must be equal to 005010X220A1.
	10626	598	Choose Category	Syntax Error for #segelm# #location# #value#. #reason#
	10605	552	Choose Category	Code Value #value# not found in the dictionary code list for #segelm# at col. #loc#
	30188	297	Choose Category	The Diagnosis Code #FS_FindCodeValue# was not found in Code Table #FS_FindCodeList#.
	30189	297	Choose Category	The Diagnosis Code #FS_FindCodeValue# was not valid for date #FS_FindCodeDate#.
	30525	216	Choose Category	The Modifier Code #FS_FindCodeValue# was not valid for date #FS_FindCodeDate#
	36098	198	Choose Category	The Modifier Code #FS_FindCodeValue# was not valid for date #FS_FindCodeDate#

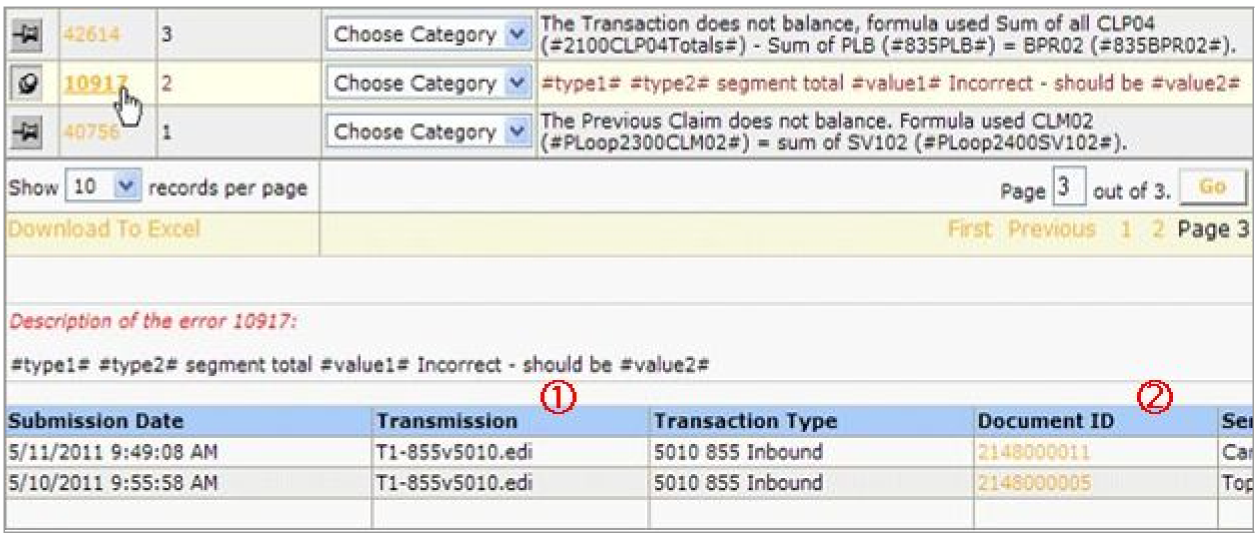
Viewing Documents with a Specific Error

To find out which transmissions contain a specific error and then view the error in a form:

1. Locate the error on the main **Errors** page. You may have to click on another page number at the bottom right to find it.

2. Click on the error number in the **Error Code** column, or use the pushpin next to it.

3. View the transmissions at the bottom of the page.



① **Transmission Column**

If a transmission contains multiple application documents with errors, each will be listed on a separate line.

The example above shows a transmission called T1-855v5010.edi that contains two application documents with error 10917.

② **Document ID Column**

This contains a unique ID that BCI assigns to each application document. Clicking on a Document ID number displays:

- A document summary (see Document Summary page via a Statistics page below).
- A link that lets you view the data in a form (see Overview of Transmission Page Data on page 49).

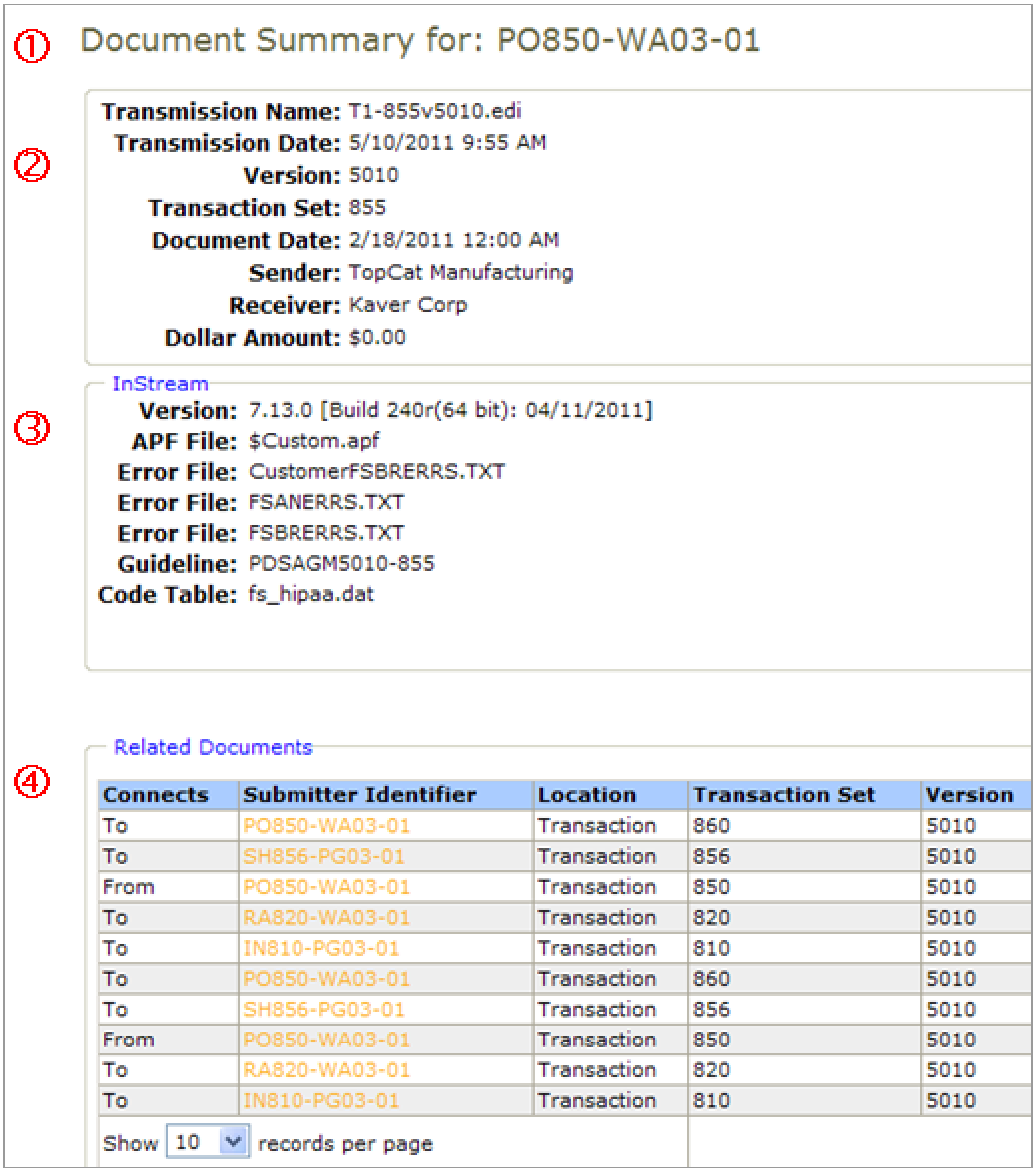
Document Summary page via a Statistics page

To see details about a particular document that contains errors:

1. From the main **Errors** page, click on the error number to display the documents at the bottom of the page.

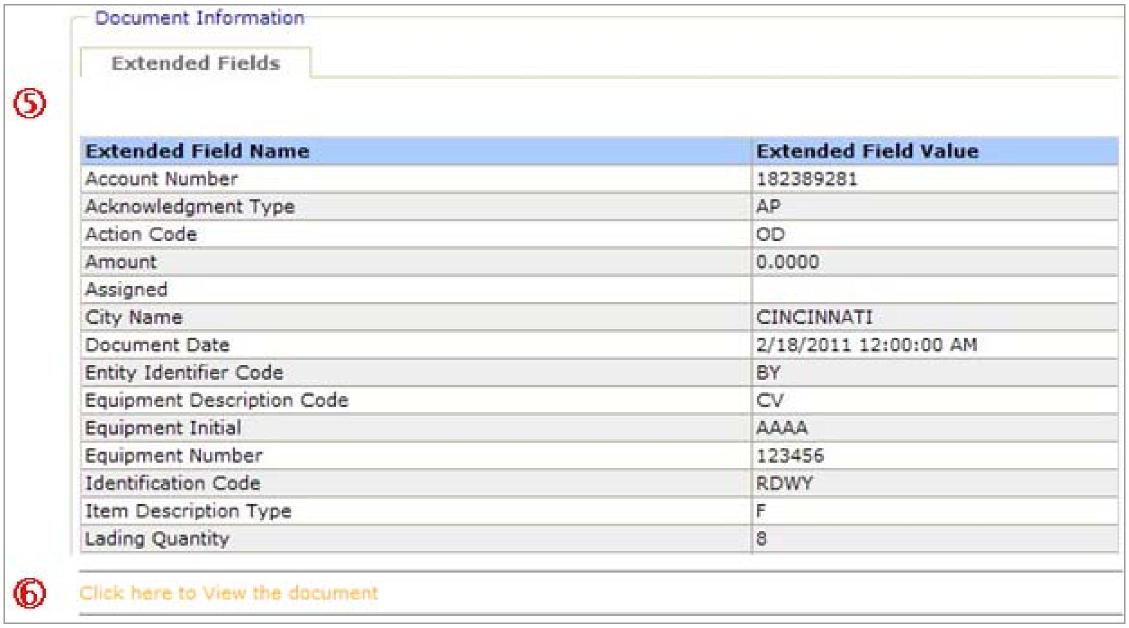
2. On the bottom of the page, click the number in the **Document ID** column.

Details about the application document appear at the top. Example:



Connects	Submitter Identifier	Location	Transaction Set	Version
To	PO850-WA03-01	Transaction	860	5010
To	SH856-PG03-01	Transaction	856	5010
From	PO850-WA03-01	Transaction	850	5010
To	RA820-WA03-01	Transaction	820	5010
To	IN810-PG03-01	Transaction	810	5010
To	PO850-WA03-01	Transaction	860	5010
To	SH856-PG03-01	Transaction	856	5010
From	PO850-WA03-01	Transaction	850	5010
To	RA820-WA03-01	Transaction	820	5010
To	IN810-PG03-01	Transaction	810	5010

Show 10 records per page



Extended Field Name	Extended Field Value
Account Number	182389281
Acknowledgment Type	AP
Action Code	OD
Amount	0.0000
Assigned	
City Name	CINCINNATI
Document Date	2/18/2011 12:00:00 AM
Entity Identifier Code	BY
Equipment Description Code	CV
Equipment Initial	AAAA
Equipment Number	123456
Identification Code	RDWY
Item Description Type	F
Lading Quantity	8

1 Document Summary for: *n*

n is the submitter ID (see Overview of Transmission Page Data on page 49).

2 Information about the transmission

Transmission Name	Name of file containing this document.
Transmission Date	Date and time when document was validated.
Version	X12 Version in use (e.g., 5010).
Transaction Set	The number of the transaction set.
Document Date	Varies by transaction set; see Overview of Transmission Page Data on page 49.
Sender	Sender as identified by pre-defined values set up by your BCI administrator.
Receiver	Receiver as identified by pre-defined values set up by your BCI administrator.
Dollar Amount	Varies by transaction set; see Overview of Transmission Page Data on page 49.

3 **Information** gives details about settings used when the document was validated

Version	Instream version used to validate the document.
APF File	Profile used to validate the document.
Error File(s)	Files that contain the error messages.
Guideline	Guideline used to validate this document.
Code Table	Table containing external codes.
TPA Table	File containing trading partner automation settings (if applicable).

4 **Related Documents** provides details about and links to documents that are related to the one you are viewing.

Connects	Indicates whether the document is the initiating document (From) or the response document (To).
Submitter Identifier	Identifier information for submitter.
Location	Describes at which loop the data is being matched.
Transaction Set	The number of the transaction set.
Version	X12 Version in use (e.g., 5010).
Submission Date	Date and time when document was submitted.

5 **Document Information** lists additional document summary data. This section appears only if the administrator has enabled it.

In the example, only the Extended Fields tab appears. However, if data exists for the category, any or all of these tabs appear:

- External Identifiers
- Extended Fields

Click the desired tab to display the information.

Note that:

- Confidential fields set for Extended Fields do not display.

6 **Click here to View the document**

If this link is active, you can use it to view the document data in a form. To be viewable in a form, EDI data (not just a results file) must have been processed by BCI. See Opening a Form on page 41.

If the EDI transaction has no form, then this link takes you directly to the raw EDI for that document.

Reporting on Success Rate

Click **Success Rate** on the main menu to see the percentage of error-free documents for each document type or partner during a timeframe of your choice.

This gives you metrics to evaluate success rates, lets you see trends over time, and lets you see which errors are causing the rates.

On the Success Rate pages, you can:

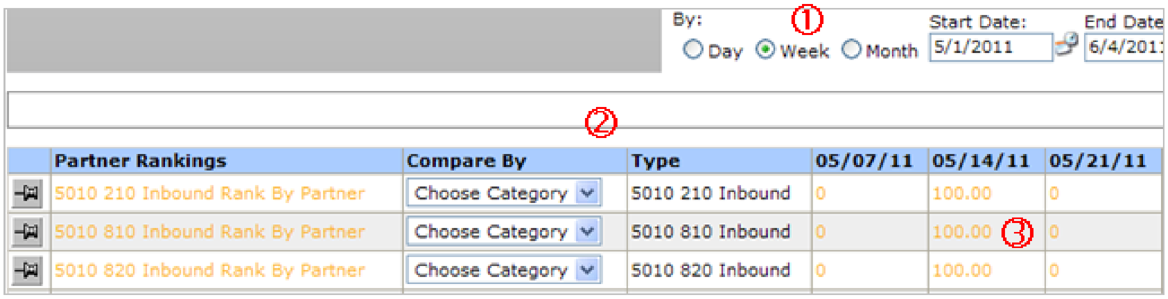
- Compare success rates for each transaction with daily, weekly, or monthly time intervals
- Filter for dates, individual partner, groups of partners, or values within documents
- For each transaction type, compare the success rates of partners
- For each partner category, compare success rates
- See the top 10 errors for each time interval

Using the Main Success Rate Page

The main Success Rate page shows the success rate by document type during a timeframe of your choice.

To do this ...	Do this ...	Number (see graphic below)
Filter the data to include certain partners or certain documents	Use the filters below the chart. Display them with **Expand**.	See Filters on page 14.
Change the date range	Type the desired date in the Ending On field, or select it from the drop-down calendar. Click **View Results**. See Specifying Dates on Statistics Pages on page 8.	1
Sort the rows differently	Click on the Type column heading or on one of the time interval column headings. On the partner rankings list, click on any heading.	2
See the top 10 errors for a time interval, transaction type, and direction	Click any success rate number. This takes you to the Error page for that interval. See Reporting on Errors on page 23.	3

Main Success Rate Page



Reporting on Transmissions

Click **Transmissions** on the main menu to see:

- Number of transmissions for each day
- Size of transmission
- Number of interchanges, groups, and transactions
- Number of good, bad, and total application documents
- Summary numbers for all of the above

You can filter with the fields across the top or in the expandable filters area just below them (see Displaying Filters on page 15).

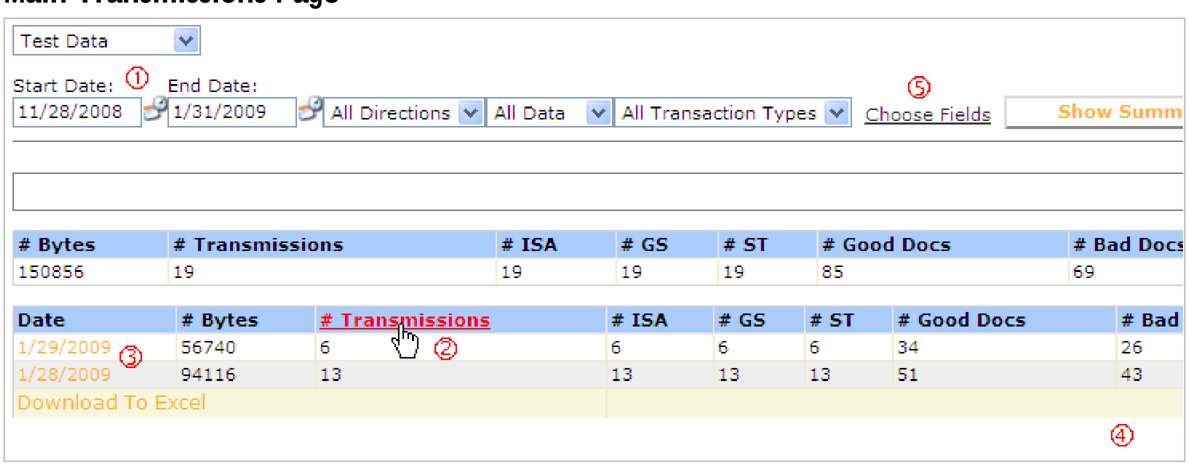
You can see more levels of detail:

- Individual transactions for a particular day
- Individual interchanges, groups, transactions, and application documents within a particular transmission
- Summary information for a particular application document

Using the Main Transmissions Page

To do this …	Do this …	Number (see graphic below)
Filter the data to include certain partners or certain documents	Use the filters along the top. Use **Click to Expand Partner Filters** at the top right to display or hide partner. When finished setting filters, click **Show Summary** to update the page. See Filters on page 14.	1
Sort the rows differently	Click on the column heading that is to be used for sorting. Click it again to sort in the opposite direction.	2
See a list of transmissions for a specific date	Click on the date in the **Date** column.	3
See more dates	Click on a page number at the bottom right.	4
Insert other fields	Click **Choose Fields** at the top right. See Overview of Adding Fields to Transmissions on page 45.	5
Investigate a specific transmission	After clicking a date, click on the plus sign in front of the transmission at the bottom of the page. To see more transmissions for this date, click on a number above the Stamp column.	See Seeing Details for a Specific Transmission on page 34.

Main Transmissions Page

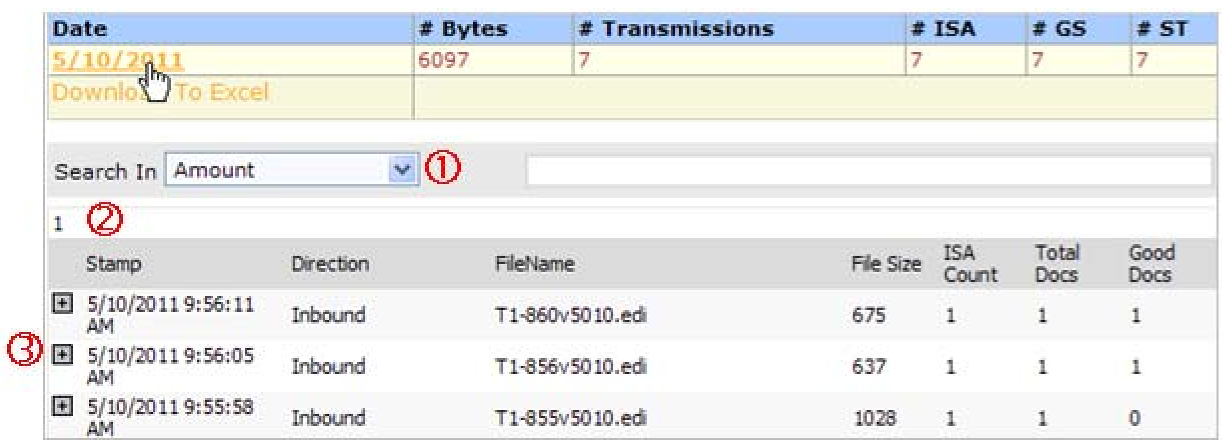


Listing Transmissions for a Specific Date

Under the Transmission pages, you can get all levels of information about a transmission, down to a form and to the actual EDI file.

From the main Transmissions page, click the date when BCI processed the transmission. You can list other dates by using the page numbers at the bottom right.

To do this …	Do this …	Number (see graphic below)
Search for the transmission	Use the **Search In** list on the left. See Searching for an Application Document on page 35.	1
See other pages of transmissions	Click another page number above the **Stamp** column.	2
Open a transmission	Click on the plus sign in front of it. This is not available for purged transmissions.	3



Column headings are:

Stamp
Date and time that BCI started processing the document.

Direction
See Inbound and Outbound Documents on page 10.

FileName
Name of the transmission.

File Size
Number of bytes in the transmission.

ISA Count
Number of ISAs in the transmission.

Total Docs
Number of application documents in the transmission (see Application Documents on page 11).

Good Docs
Number of application documents with no errors.

Rejected Docs
Number of application documents with errors.

Instream Version
Instream version used to validate the document.

Original FileName
Name supplied by Instream.

OriginalFileDate
Date supplied by Instream.

Link To
This column is not present if you do not have these permissions. For documents with no FSUID, the column is blank.

Seeing Details for a Specific Transmission

From the main Transmissions page:

1. Click the date when BCI processed the transmission.

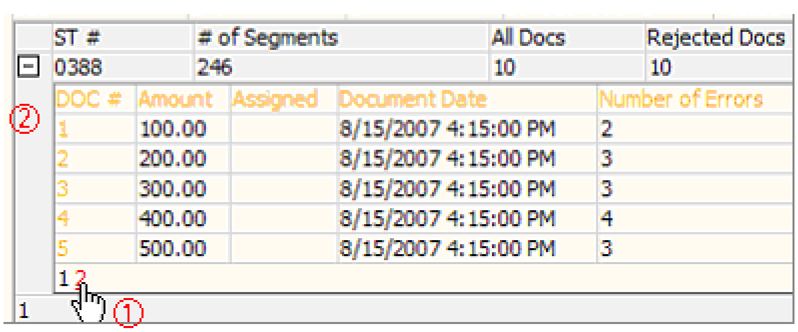
2. Locate the transmission by:

   - Using the page numbers above the Stamp column.

   - Using the Search field above the list of transmissions (see Searching for an Application Document on page 35).

3. Open the transmission by clicking on the plus sign in front of it.

To see other application documents in this transmission, use the page numbers at the bottom left (see 1 in the graphic).



Application Document Column Headings

The default column headings (See 2 in the graphic) for the application document are:

Doc #
Sequence number for each application document in the transaction set. Five lines display at a time. To see the next set of five lines, click the next number below the list (see 1 in the graphic). To investigate a particular application document, click on its number in the Doc # column.

Amount
Only 820 documents have amounts. For the source of this information, see Overview of Transmission Page Data on page 49.

Document Date
Date from the EDI data itself. This varies by transaction. See Overview of Transmission Page Data on page 49.

Number of Errors
Number of errors with severity greater than 2.

Original File Date
Name supplied by Instream.

Original File Name
Date supplied by Instream.

Receiver
Partner receiving the data, as identified by criteria set up by the BCI administrator.

Sender
Partner sending the data, as identified by criteria set up by the BCI administrator.

Submitter ID
This value comes from the EDI. It varies by transaction set. See Overview of Transmission Page Data on page 49.

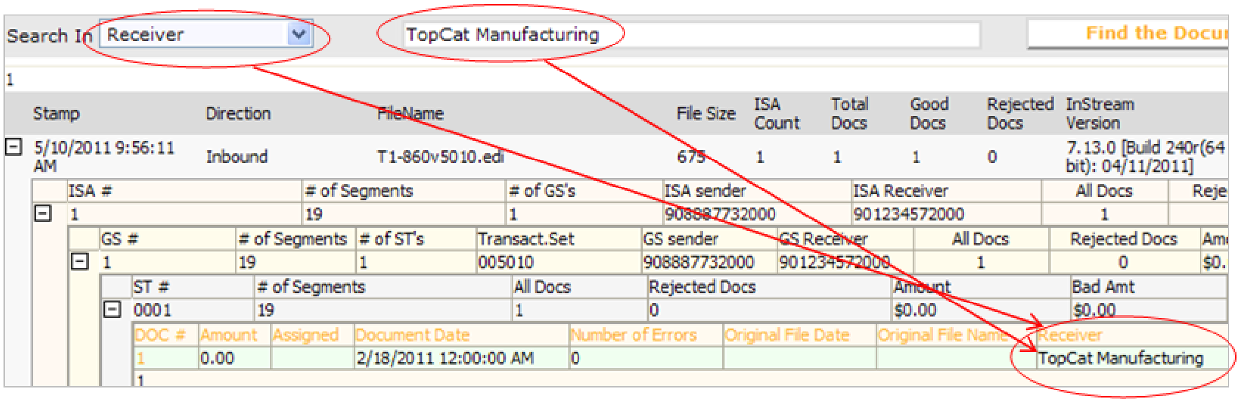
Searching for an Application Document

From the main Transmissions page, click the date when BCI processed the transmission.

At the bottom, use the **Search In** field:

1. Choose a column from the drop-down list.
2. Type the value to be found in that column. The search is case-sensitive.
3. Click **Find the Document**.

The first transmission to contain that value will open and the document with the value will be highlighted in green:



Displaying Application Document Summary Details

From the main Transmissions page:

1. Click the date when BCI processed the transmission.

2. Locate the transmission by:

   - Using the page numbers at top left, above the Stamp column
   - Using the Search field above the list of transmissions (See Searching for an Application Document on page 35).

3. Open the transmission by clicking on the plus sign in front of it.

4. Locate the application document, using the page numbers below the DOC# column if necessary.

5. Click on the number in the DOC# column.

This opens the document summary page, which is the same as the document summary under the Errors page (see Document Summary page via a Statistics page on page 27).

4 Files Pages

Overview of Files Pages

Your BCI administrator may have set up locations for you to upload or view files on the BCI server.

Information / Actions	Menu	See…
Upload EDI and other files for processing	Upload	Uploading Files below
View files in a designated directory on the server	View	Viewing Files on page 38

Uploading Files

You may have a directory on the BCI server where you can upload EDI data and/or other files. Before uploading files, find out the purpose and requirements from your administrator.

To do this, click **Upload** on the main menu.

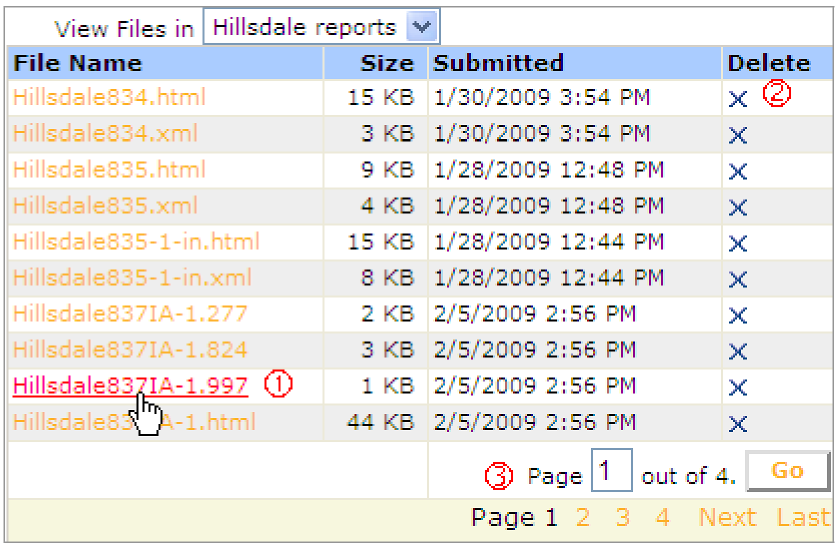
To upload:

1. Type the path and name of the file to upload, or use the **Browse** button.
2. Select the destination if you are offered a choice. Consult your administrator if you do not know which destination to choose.
3. Click **Upload**.

Viewing Files

Your BCI administrator may have set up a location for you to view files generated by BCI. Use the **View** menu to see files stored there.

If you have access to multiple viewing directories, pick the one that you want from the drop-down list at the top left. Otherwise, the contents of the directory will appear.


View Files in Hillsdale reports

File Name	Size	Submitted	Delete
Hillsdale834.html	15 KB	1/30/2009 3:54 PM	X ②
Hillsdale834.xml	3 KB	1/30/2009 3:54 PM	X
Hillsdale835.html	9 KB	1/28/2009 12:48 PM	X
Hillsdale835.xml	4 KB	1/28/2009 12:48 PM	X
Hillsdale835-1-in.html	15 KB	1/28/2009 12:44 PM	X
Hillsdale835-1-in.xml	8 KB	1/28/2009 12:44 PM	X
Hillsdale837IA-1.277	2 KB	2/5/2009 2:56 PM	X
Hillsdale837IA-1.824	3 KB	2/5/2009 2:56 PM	X
Hillsdale837IA-1.997 ①	1 KB	2/5/2009 2:56 PM	X
Hillsdale83[illegible]A-1.html	44 KB	2/5/2009 2:56 PM	X

③ Page 1 out of 4. Go

Page 1 2 3 4 Next Last

You can:

1 Open a file by clicking its filename.

2 Delete a file by clicking X in the Delete column.

3 See other pages of files by clicking a page number at the bottom. List more pages by clicking […].

5 My Account

Maintaining your Account

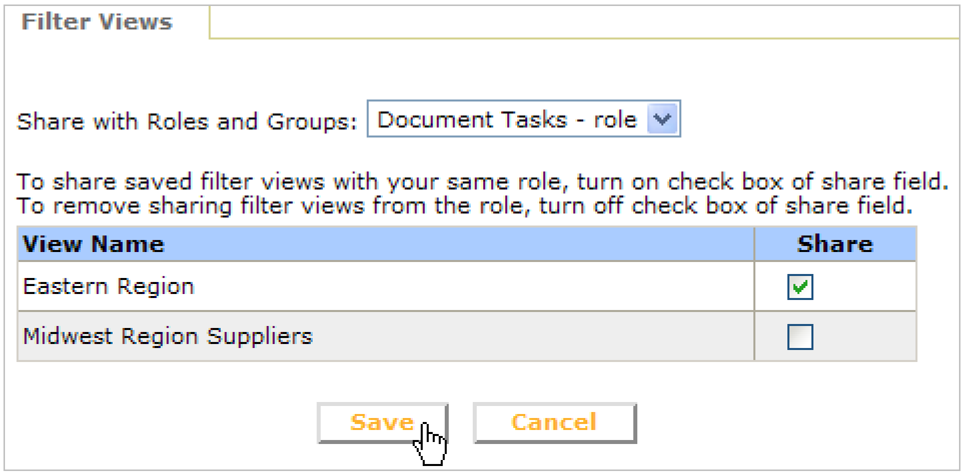
You can use My Account at the bottom of the left menu to reset your password and share your own filter views:

1. Click **My Account**.
2. Make the changes.
3. Click **Save Changes**.

Filter Views

If you have saved filter views on one of the statistics pages, you can use the **Filter Views** tabs to share these saved views with others with the same roles or partner groups.

This example shares the **Eastern Region** view with other users who are in the Document Tasks role:



6 Appendix A - Forms

Opening a Form

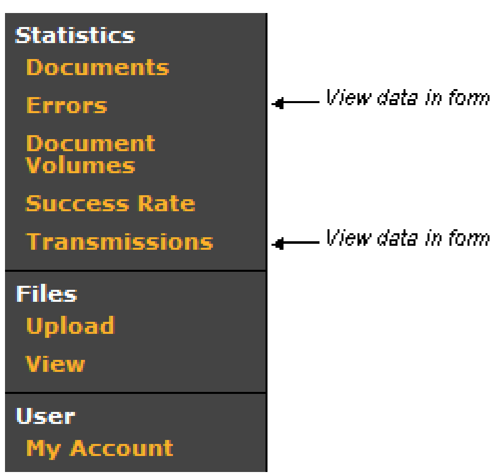
If your BCI administrator has given you permission, you can use forms to view documents containing errors.

Note: BCI does not allow you to edit the form, although you can expand and collapse sections for ease of viewing.

To open a document in a form:

- The document must be one of these: 210, 810, 820, 850, 855, 856, or 860.
- The document's actual EDI data (not just a validation results file) must be stored in BCI

Forms are available under these menus:



To view a form under the Errors pages

1. From the main **Errors** page, click on the error number to display the documents at the bottom of the page.

2. On the bottom of the page, click the number in the **Document ID** column.

3. From the Document Summary page, use **Click here to View the document** at the bottom left.

To view a form under the Transmissions pages

1. From the main **Transmissions** page, click on the date.

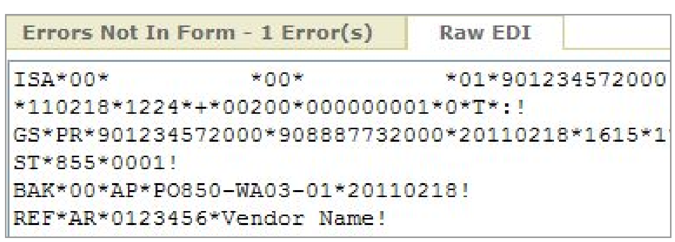
2. On the bottom of the page, click the plus sign in front of the transmission.

3. Locate the application document (you may have to use the page number at the bottom of the **Doc #** column) and look in the **# of Errors** column to verify that it has errors.

4. Click on its number in the **Doc #** column.

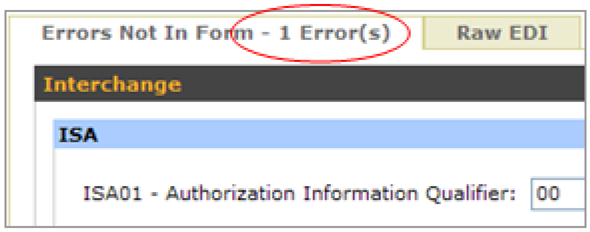
5. At the bottom of the Document Summary page, use **Click here to View the document**.

Using a Form

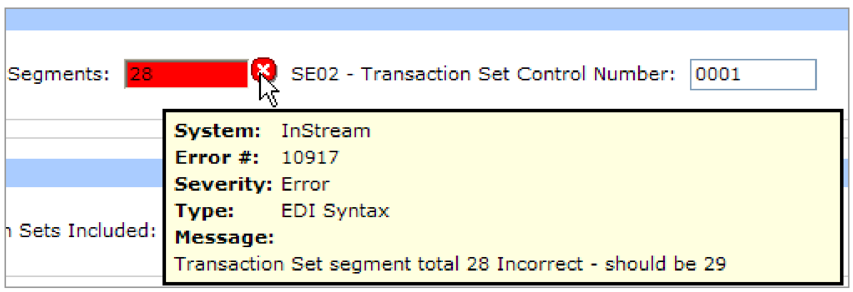
To do this …	Do this …
View errors	The **Errors Not In Form** tab shows the error(s) on a form. Most forms mark errors with ☒. Rest your mouse cursor on it to see the explanation.
See the EDI	The **Raw EDI** tab on a form shows the current EDI as it is represented on the form. 

Common Elements on Forms

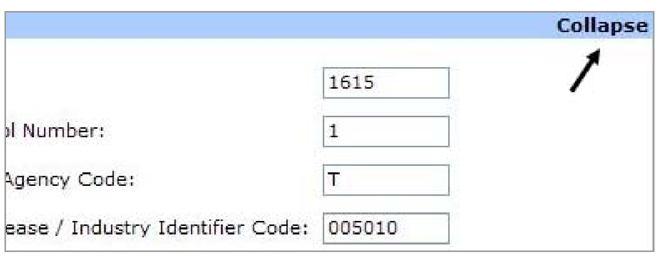
- The tabs at the top show the number of errors:



- Errors are in red. To view error messages, point your mouse at the .



- You can expand or collapse sections of the form for ease of use.

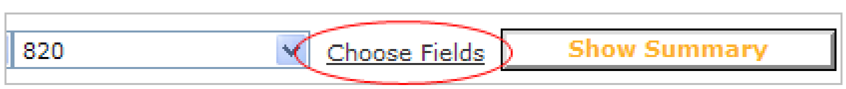


7 Appendix B - Adding Fields to the Transmissions Page

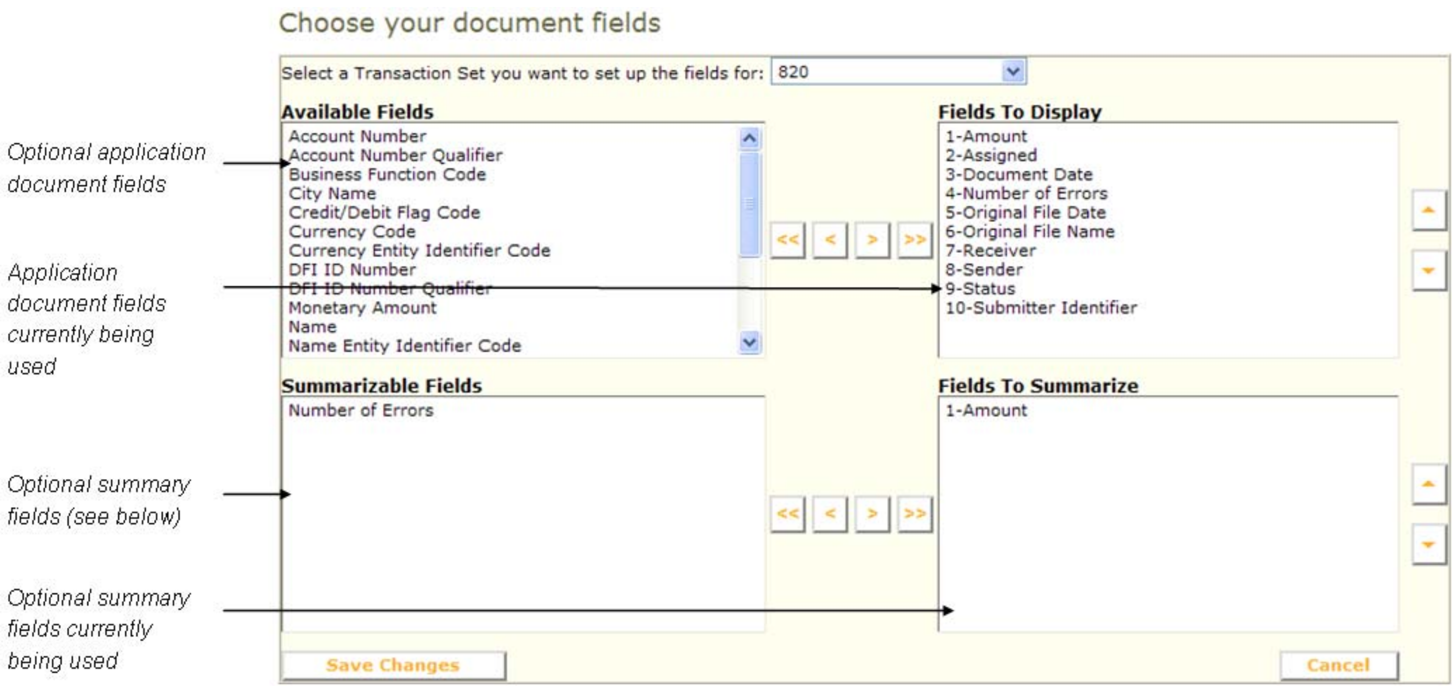
Overview of Adding Fields to Transmissions

Please Note
Your BCI administrator uses the **Settings	Document Fields** page to specify which additional fields are to be stored. Once this is done, the data from these fields for future transmissions will be stored in the database and available for you to view on the Transmissions page.

On the Transmissions pages, you can add and remove columns. These changes are stored in a cookie and so they are specific to your browser. To add, remove, or rearrange fields, use the **Choose Fields** link at the top of the Transmissions page:

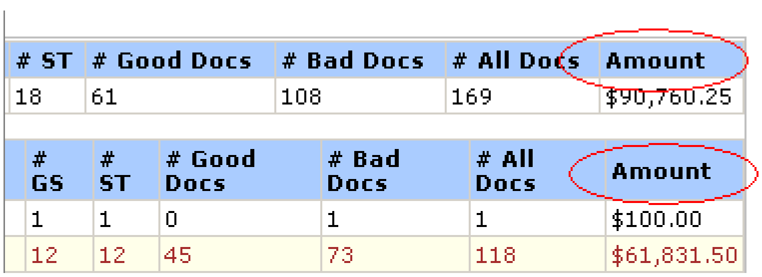


This displays a page where you can customize the summary and application document fields.



Adding and Deleting Summary Fields

To add a field to the top of the Transmissions Page:



# ST	# Good Docs	# Bad Docs	# All Docs	Amount
18	61	108	169	$90,760.25

# GS	# ST	# Good Docs	# Bad Docs	# All Docs	Amount
1	1	0	1	1	$100.00
12	12	45	73	118	$61,831.50

1. Click **Choose Fields** at the top of the Transmissions page.
2. Select a transaction at the top right.
3. Under **Summarizable Fields**, select one or more fields and click to move them to **Fields To Summarize**.
4. You can rearrange the **Fields to Summarize** by selecting one and then using the and arrows.
5. Remove unwanted fields by selecting them in **Fields to Summarize** and clicking .

6. Click **Save Changes**.

7. If you are finished, click **Cancel**.

To see the changes to the fields:

1. Choose the transaction type at the top.

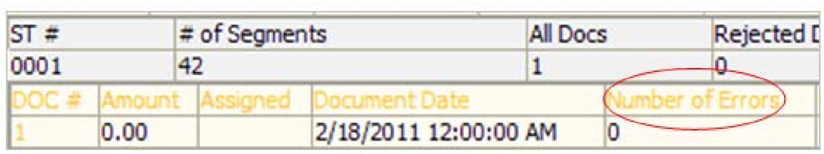
2. Click **Show Summary**.

3. Look at the two rows of column headings across the top of the page. The columns that you added should be on the right.

Adding and Deleting Application Document Fields

See Overview of Transmission Page Data on page 49 for a list of fields that you can add, along with the EDI elements where the data is found.

You can add or remove an application document field on the Transmissions page:



ST #	# of Segments	All Docs	Rejected D
0001	42	1	0

DOC #	Amount	Assigned	Document Date	Number of Errors
1	0.00		2/18/2011 12:00:00 AM	0

To add a field:

1. Click **Choose Fields** at the top of the Transmissions page.

2. Select a transaction at the top right.

   Fields to Display shows which application document fields are currently being displayed.

3. To add fields, select them under **Available Fields** and click to move them to **Fields To Display**.

4. Rearrange **Fields to Display** by clicking a field you want to move and using the and arrows.

5. Remove unwanted fields by selecting them in **Fields to Display** and clicking .

6. Click **Save Changes.**

7. If you are finished, click **Cancel**.

To see the new fields:

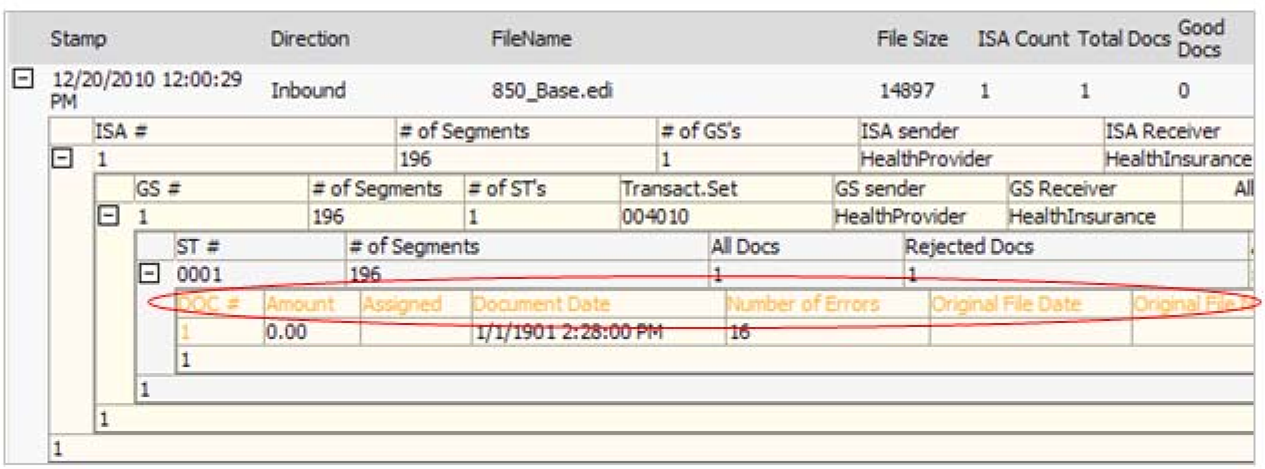
1. Choose the transaction type at the top.
2. Click on a date that includes that transaction type.
3. Open a transmission that includes that transaction type.
4. The column headings within the transaction set should reflect your changes.

If the field is always empty of data, check with your BCI administrator to see if that data is being stored in the database.

8 Appendix C - Transmission Page Data Maps

Overview of Transmission Page Data

This appendix describes the source of information that appears on the Transmission page.



This information is different for each transaction. In addition, BCI administrators can configure the information on this page.

Please refer to the following charts for specifics:

210 Transmission Page Map

210 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	
DocumentID	Unique identifier
TransmissionID	From Transmission Table
DocumentNumber	Offset of document in current ST
SenderID	From Sender Table
ReceiverID	From Receiver Table
TransactionType	210
DocumentDate	B306 - Date
SubmitterIdentifier	B303
Amount	N/A
NumberOfErrors	Count of errors with a severity greater than 2
STID	From ST table

210 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
City Name	N401
Date/Time Qualifier	B310
Delivery Date	B309
Entity Identifier Code	N101
Equipment Initial	N701
Equipment Number	N702
Identification Code	C203
Invoice Number	B302
Name	N102
Payment Method Type Code	C206
Postal Code	N403

210 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
Purchase Order Number	OID02
Shipment ID Number	B303
Shipment Method of Payment	B304
Shipment Qualifier	B301
Standard Carrier Alpha Code	B311
State or Province	N402
Tariff Service Code	B313
Terms Net Due Date	ITD06
Terms Type Code	ITD01
Transportation Method/Type Code	R304
Transportation Terms Code	B314
Weight	N703
Weight Qualifier	N704

810 Transmission Page Map

810 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	**Location of Data in EDI**
DocumentID	Unique identifier
TransmissionID	From Transmission Table
DocumentNumber	Offset of document in current ST
SenderID	From Sender Table
ReceiverID	From Receiver Table
TransactionType	810
DocumentDate	BIG01
SubmitterIdentifier	BIG02

810 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	**Location of Data in EDI**
Amount	0
NumberOfErrors	Count of errors with a severity greater than 2
STID	From ST table

810 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
BIG Invoice Number	BIG02
BIG Purchase Order Number	BIG04
BIG Transaction Set Purpose Code	BIG08
BIG Transaction Type Code	BIG07
City Name	N401 (first occurrence)
CUR Currency Code	CUR02
CUR Entity Identifier Code	CUR01
Entity Identifier Code	N101 (first occurrence)
Invoice Amount	TDS01
Name	N102 (first occurrence)
Postal Code	N403 (first occurrence)
Reference Identification	REF02 (first occurrence)
Reference Identification Qualifier	REF01 (first occurrence)
Shipment Method of Payment	FOB01
State or Province	N402 (first occurrence)
Terms Net Due date	ITD06 (first occurrence)
Terms Type Code	ITD01 (first occurrence)
Transportation Terms Code	FOB05

820 Transmission Page Map

820 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	**Location of Data in EDI**
DocumentID	Unique identifier
DocumentID	Unique identifier
TransmissionID	From Transmission Table
DocumentNumber	Offset of document in current ST
SenderID	From Sender Table
ReceiverID	From Receiver Table
TransactionType	820
DocumentDate	BPR16 - Date
SubmitterIdentifier	TRN02
Amount	BPR02
NumberOfErrors	Count of errors with a severity greater than 2
STID	From ST table

820 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
Account Number	BPR09
Account Number Qualifier	BPR08
Business Function Code	BPR17
City Name	N401
Credit/Debit Flag Code	BPR03
Currency Code	CUR02
DFI ID Number	BPR07
DFI ID Number Qualifier	BPR06
Entity Identifier Code	CUR01
Monetary Amount	BPR02

820 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
Name	N102
Originating Company Identifier	BPR10
Payment Format Code	BPR05
Payment Method Code	BPR04
Postal Code	N403
Reference Identification	REF02
Reference Identification Qualifier	REF01
State or province	N402
Transaction Handling Code	BPR01

850 Transmission Page Map

850 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	**Location of Data in EDI**
DocumentID	Unique identifier
TransmissionID	From Transmission Table
DocumentNumber	Offset of document in current ST
SenderID	From Sender Table
ReceiverID	From Receiver Table
TransactionType	850
DocumentDate	BEG05
SubmitterIdentifier	BEG03
Amount	0
NumberOfErrors	Count of errors with a severity greater than 2
STID	From ST table

850 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
Amount Qualifier Code	AMT01
City Name	N401
Description	PID05
Entity Identifier Code	N101
Equipment Description Code	TD301
Equipment Initial	TD302
Equipment Number	TD303
Identification Code	TD503
Marks and Numbers	MAN02
Marks and Numbers Qualifier	MAN01
Monetary Amount	AMT02
Name	N102
Packaging Characteristic Code	PKG02
Packaging Code	TD101
Postal Code	N403
Product Description Code	PID04
Product/Service ID	LIN03
Product/Service ID Qualifier	LIN02
Purchase Order Number	BEG03
Purchase Order Type Code	BEG02
Quantity	CTP04
Routing Sequence Code	TD501
Seal Number	TD309
Shipment Method of Payment	FOB01
Shipment/Order Status Code	TD506
State or Province Code	N402
Terms Basis Date Code	ITD02

850 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
Terms Net Due Date	ITD06
Terms Type Code	ITD01
Transaction Set Purpose Code	BEG01
Transportation Method/Type Code	TD04
Transportation Terms Code	FOB05
Unit or Basis for Quantity	CTP05
Unit or Basis for Volume	TD110
Unit or Basis for Weight	TD108
Unit Price	CTP03
Volume	TD109
Weight	TD107
Weight Qualifier	TD106

855 Transmission Page Map

855 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	**Location of Data in EDI**
DocumentID	Unique identifier
TransmissionID	From Transmission Table
DocumentNumber	Offset of document in current ST
SenderID	From Sender Table
ReceiverID	From Receiver Table
TransactionType	855
DocumentDate	BAK04
SubmitterIdentifier	BAK03

855 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	**Location of Data in EDI**
Amount	N/A
NumberOfErrors	Count of errors with a severity greater than 2
STID	From ST table

855 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
Account Number	CSH04
Acknowledgement Type	BAK02
Action Code	CSH02
Amount	CSH03
City Name	N401
Entity Identifier Code	N101
Equipment Description Code	TD301
Equipment Initial	TD302
Equipment Number	TD303
Identification Code	TD503
Item Description Type	PID01
Lading Quantity	TD102
Marks and Numbers	MAN02
Marks and Numbers Qualifier	MAN01
Name	N102
Packaging Code	TD101
Postal Code	N403
Product/Process Characteristic Code	PID02
Product/Service ID	LIN03
Product/Service ID Qualifier	LIN02
Purchase Order Number	BAK03

855 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
Routing Sequence Code	TD501
Sales Requirement Code	CSH01
Seal Number	TD309
Shipment Order/Status Code	TD506
State or Province Code	N402
Terms Basis Date Code	ITD02
Terms Net Days	ITD07
Terms Type Code	ITD01
Transaction Set Purpose Code	BAK01
Transportation Method/Type Code	TD504
Weight	TD107
Weight Qualifier	TD106
Unit or Basis for Weight	TD108
Volume	TD109
Unit or Basis for Volume	TD110

856 Transmission Page Map

856 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	**Location of Data in EDI**
DocumentID	Unique identifier
TransmissionID	From Transmission Table
DocumentNumber	Offset of document in current ST
SenderID	From Sender Table
ReceiverID	From Receiver Table
TransactionType	856

856 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	**Location of Data in EDI**
DocumentDate	BSN03 - Date BSN04 - Time
SubmitterIdentifier	BSN02
Amount	N/A
NumberOfErrors	Count of errors with a severity greater than 2
STID	From ST table

856 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
Assigned Identification	PRF04
Change Order Sequence Number	PRF03
Contract Number	PRF06
Date	DTM02
Date/Time Qualifier	DTM01
Hierarchical Structure Code	BSN05
Purchase Order Number	PRF01
Purchase Order Type Code	PRF07
Release Number	PRF02
Shipment Identification	BSN02
Time	DTM03
Transaction Set Purpose Code	BSN01

860 Transmission Page Map

860 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	**Location of Data in EDI**
DocumentID	Unique identifier
TransmissionID	From Transmission Table

860 Transmission Page Map	
Fields that Display by Default	
Field on Transmission Page	**Location of Data in EDI**
DocumentNumber	Offset of document in current ST
SenderID	From Sender Table
ReceiverID	From Receiver Table
TransactionType	860
DocumentDate	BCH06
SubmitterIdentifier	BCH03
Amount	N/A
NumberOfErrors	Count of errors with a severity greater than 2
STID	From ST table

860 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
Amount Qualifier Code	AMT01
Change Order Sequence Number	BCH05
City Name	N401
Contract Number	BCH08
Date	DTM02
Date/Time Qualifier	DTM01
Entity Identifier Code	N101
Equipment Description Code	TD301
Equipment Initial	TD302
Equipment Number	TD303
Identification Code	TD503
Marks and Numbers	MAN02
Marks and Numbers Qualifier	MAN01
Monetary Amount	AMT02
Name	N102
Packaging Code	TD101
Postal Code	N403

860 Transmission Page Map	
Fields that you can add with Choose Fields Link	
Field on Transmission Page	**Location of Data in EDI**
Price Identifier Code	CTP02
Purchase Order Number	BCH03
Purchase Order Type Code	BCH02
Reference Identification	REF02
Reference Identification Qualifier	REF01
Routing Sequence Code	TD501
Sales Requirement Code	CSH01
Seal Number	TD309
Shipment Method of Payment	FOB01
Shipment Order/Status Code	TD506
State or Province Code	N402
Terms Basis Date Code	ITD02
Terms Net Days	ITD07
Terms Type Code	ITD01
Time	DTM03
Transaction Set Purpose Code	BCH01
Transportation Method/Type Code	TD504
Transportation Terms Code	FOB05
Unit or Basis for Measurement Code	TD108
Unit Price	CTP03
Volume	TD109
Weight	TD107
Weight Qualifier	TD106

9 Index