

TIBCO Foresight® Archive and Retrieval System

Administration Guide

*Software Release 5.2
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General Contact Information

TIBCO Software Inc.
3303 Hillview Avenue
Palo Alto, CA 94304 USA
Tel: +1 650 846 1000
Fax: +1 650 846 1005

Technical Support

E-mail: support@tibco.com
Web: <https://support.tibco.com>

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1 Introduction

Intended Audience

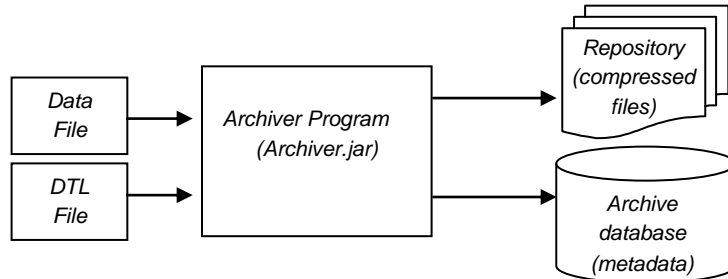
This manual is intended for TIBCO Foresight® Archive and Retrieval System administrators. It will tell you how to administer your Foresight® Archive and Retrieval System.

For other Foresight Archive and Retrieval System information, please see:

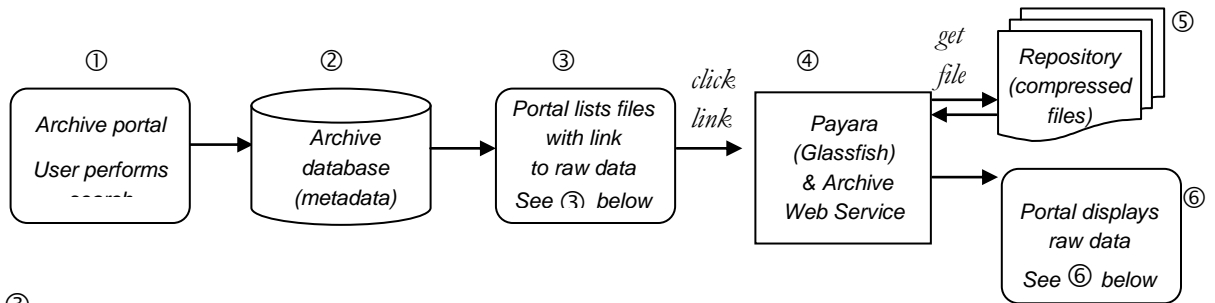
- **TIB_fsp_archive_*n.n*_archiveuser.pdf** for user information
- **TIB_fsp_archive_*n.n*_archivesystems.pdf** for managing an existing installation
- **TIB_fsp_archive_*n.n*_installation.pdf** for installation and setup information.

Big Picture

Archiving a File



Viewing an Archived File (Raw Data / Raw DTL File)



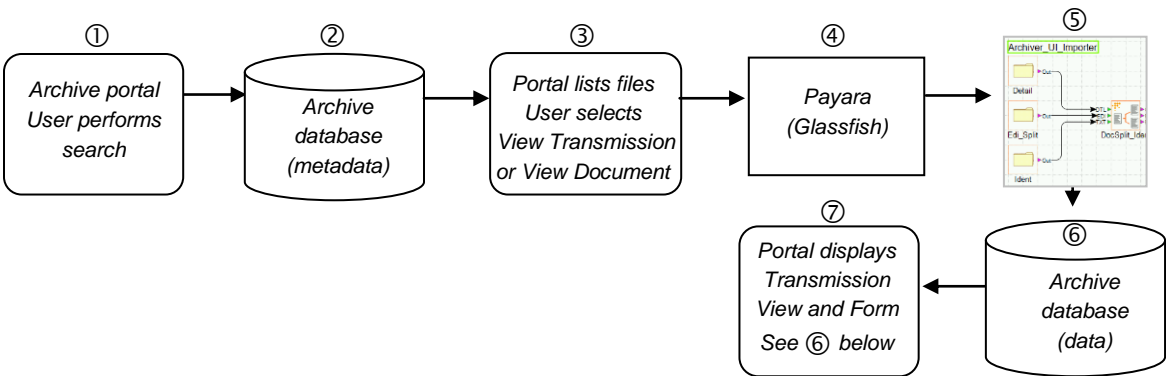
③

Select	Name	Size	Scope	Date	Imported By	View
<input checked="" type="checkbox"/>	625-5052-W3S2008-WR-EPEP-15Docs-ZRV-TM1.edi	23120 bytes	PRIMARY	3/6/2015 4:21 PM	Archiver-1	View
<input type="checkbox"/>	625-5052-W3S2008-WR-EPEP-15Docs-ZRV-TM1.dtl	40524 bytes	DETAIL	3/6/2015 4:21 PM	Archiver-1	View

⑥

```
ISA*00*          *00*          *01*WellReso
GS*WL*WellResources*EPEP333555577*2012052
ST*625*0001*Implementation Convention Refer
BGN*06*WR-EPEP-W3S2008 2012-1*20120501*1301
HL*1**D*0!
PID*F*WLC*UT*Pure Water*Match-W4S2012-TM1 (
DTP*090*RTS*20120615163501!
REF*ADB*MPN-EPEPSW1*Eternal Purpose-Essenti
YNQ*EH*Y*D8*20120601*Element YNQ05 - Free P
MTX*ADD*FPP Portal Search Value in Element
```

Viewing an Archived File (Transmission and Form View)



③ Portal - user selects transmission view

Select	Name
<input type="checkbox"/>	625-5052-W3S2008-WR-EPEP-15Docs-ZRV-TM1.edi
<input type="checkbox"/>	625-5052-W3S2008-WR-EPEP-15Docs-ZRV-TM1.dtl
<input type="checkbox"/>	625-5052-W3S2008-WR-EPEP-15Docs-ZRV-TM1.xml
<input checked="" type="checkbox"/>	625-5052-W3S2008-WR-EPEP-15Docs-ZRV-TM1.edi.log.EDI

[View in Operational Monitor](#)

Actions

Select an Action
Select an Action
View Transmission (File)

Perform Action

⑦ Transmission view

1						
Stamp		Direction		FileName		File Size
4/20/2015 10:17:43 AM		Inbound		873-5052-W3S2008-LSF-CC-15Docs-ZRV-TM1029eaf6e-e52a-11e4-910e-83ccabfa734a.edi		38565
[-]	ISA #		# of Segments		# of GS's	ISA Sender
	1		424		1	LiveStockFarm
	GS #		# of Segments		# of ST's	Transact.Set
	1		422		15	005052
[-]	ST #		# of Segments		All Docs	Rejected Docs
	0001		28		1	1
	DOC #	Amount	Assigned	Document Date		Number of Errors
	1	1.00		8/15/2012 2:55:01 PM		1
0002		28		1		0

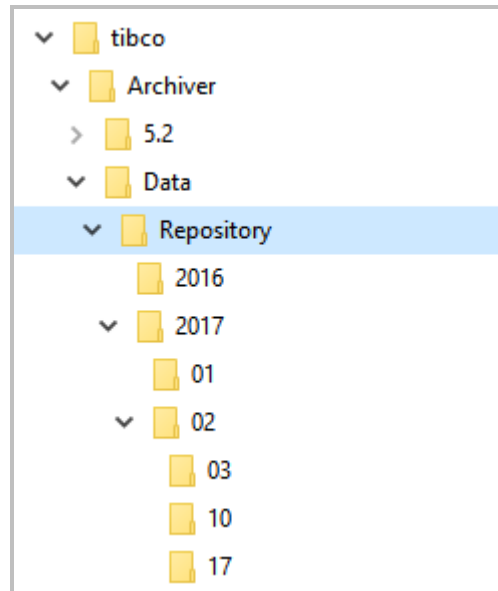
⑦ Form

LQ		Collapse
LQ01 - Code List Qualifier Code:	Err	LQ02 - Industry Code: W3S2008 625LQ02 873-LQ02
<div><div>System: InStream Error #: 10605 Severity: Error Type: Syntactical Requirement Message: Code Value "Err" not found in the dictionary code list for LQ01 (D.E. 1270) at col. 4</div></div>		
N9		
N901 - Reference Identification Qualifier:		
N902 - Reference Identification:		

Repository

The **Repository** is the set of directories where Foresight Archive and Retrieval System stores its archived files.

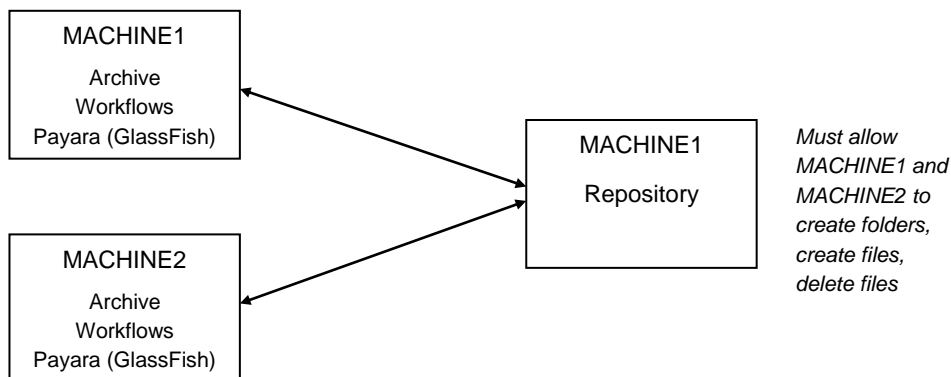
You specify the root folder (in the example below, this is Repository) and Foresight Archive and Retrieval System creates the folders below based on date and time of day.



When planning for how much storage to allocate for the repository, consider that Foresight Archive and Retrieval System had compression rates of about 80% on the text EDI and validation detail files in testing. Archived image files such as JPEG files are not compressed.

The repository can be on the Foresight Archive and Retrieval System processing machine or on another machine.

Example implementation:



You can have multiple repositories, but only one can be active at a time.

To alert the portal to the repository location, see [Root Folders](#) on page 15.

System Database

Note: Beginning with Release 5.0.0, the Foresight Archive and Retrieval System database supports partitioning, allowing you to drop database partitions and maintain a manageable database size. TIBCO has included a recommended partitioning scheme with the user documentation for TIBCO Foresight® Transaction Insight® Release 5.0.0 and later. Refer to **Database_Partitioning.pdf**.

The Foresight Archive and Retrieval System database is separate from the Transaction Insight® database. It contains:

- The same tables (mostly empty), stored procedures, and views as a Transaction Insight database. The “shadow” Transaction Insight database is used in Foresight Archive and Retrieval System only for creating the transmissions and documents views. This shadow database is not used in the traditional Transaction Insight manner where all incoming files are added to it and it is not a backup for the Transaction Insight database. The shadow Transaction Insight tables in Foresight Archive and Retrieval System are partitioned by default. The same partition maintenance will need to be performed.
- A small set of Foresight Archive and Retrieval System’s tables, stored procedures, and views for Foresight Archive and Retrieval System functions such as importing, filtering, and responding to user requests. Before Foresight Archive and Retrieval System stores files in the repository, it extracts certain data elements from the files and stores them in a database, thereby creating searchable links to the files. Users can retrieve files from the repository by using these data elements as search criteria.

There are a number of stored procedures for use by Foresight Archive and Retrieval System. The DBA will use MakeFilter and DropFilter directly when adding filters.

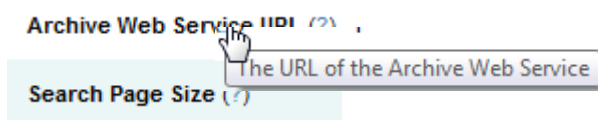
2 Administrative Pages

Settings

Logon as an administrator and choose **Archive | Admin | Settings** to set the following.

Archive Administration	
SETTINGS	ACTIONS
ROOT FOLDERS	FILTERS
Name	Value
Archive Web Service URL (?)	http://hv-qa2008r2x6
Search Page Size (?)	10
Document Result Limit (?)	32
Search Preferences Limit (?)	6
Search Page Default Date Days (?)	60

For help, rest your mouse cursor on a question mark:



Foresight Archive and Retrieval System Web Service URL

This is initially set to the server where the installation was run. If necessary, change the server to where Payara (formerly Glassfish) and the Foresight Archive and Retrieval System client are running. Leave the rest of the line alone:

```
http://lbrownst-T410:8080/ArchiverWebService/ArchiverWebServiceService
```


By default, Payara uses these TCP/IP ports:

HTTP Ports: 4848, 8181, 8080

IIOP Ports: 3820, 3700, 3920

JMX Port: 8686

Please see **Webservices_at_Foresight.pdf** for complete information about Payara.

Search Page Size	Specify how many files or documents should be listed on one page as a result of a search. When search results exceed this number, links to the other pages appear at the bottom.
Document Result Limit	Specify how many documents should be listed on one page as a result of a search from your custom filters. When search results exceed this number, matching documents will not be displayed.
Search Preferences Limit	Specify how many search filters a user can set up under Search Search Preferences .
Search Page Default Date Days	<p>Used by the File Search page to specify the default number of days for Foresight Archive and Retrieval System to search back from the current date.</p> <p>The value is initially set to 30 days and can be changed using the Edit option .</p>

Increasing either the **Document Result Limit** and/or the **Search Preferences Limit** could degrade the performance of the Foresight Archive and Retrieval System Search functions. Exercise caution when increasing these limits.

Administrative Actions

Using the Admin Actions Page

Logon as an administrator and choose **Admin | Actions** to set the following.

SETTINGS	ACTIONS	ROOT FOLDERS	FILTERS	TEMPORARY IMAGE ST
ID	Action Name	Description	Workflow D	
1	View Transmission (File)	Import File	C:\TIBCO\Sy	
2	View Transmission (Document)	Import Document	C:\TIBCO\Sy	
3	Start Validation Highlighter	Start Generating VH report	C:\TIBCO\Sy	
4	Get Validation Highlighter	Retreives VH Result	C:\TIBCO\Sy	

When a user selects a file after finding it in a search, they can request an action.

The Transmission actions shown above are defaults. They generate a transmission view. To do this, Foresight Archive and Retrieval System retrieves the files or documents from the repository and put them in the specified Workflow Directory. The Archiver_UI_Importer workflow (discussed below) picks them up there, processes them, and displays the transmission view to the user.

The Validation Highlighter views show EDIFACT data in a form that includes the errors, plus links to guideline information. Some setup may be required. Please see **ValidationHighlighter.pdf** and **Data_Types_and_TI.pdf**.

ID

Internal TIBCO Foresight use.

Action Name

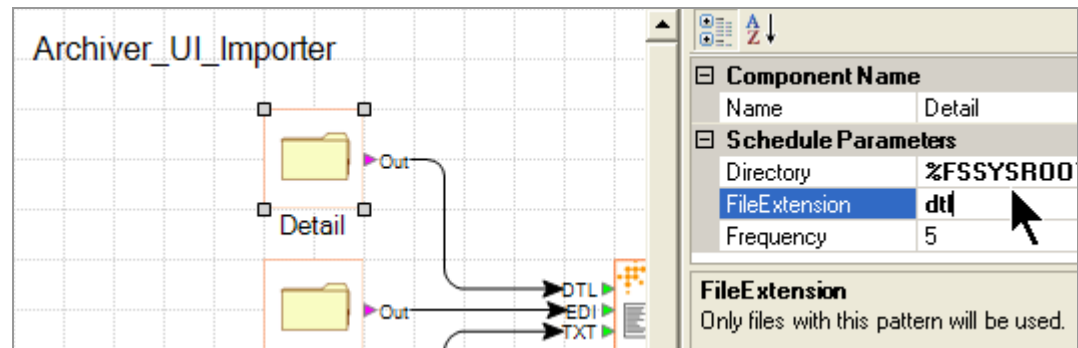
Description

Shows up on the Pending page.

Workflow Directory

This is the directory where the Archiver_UI_Importer workflow picks up files.

Example in TIBCO Foresight® Studio®:



You will need to substitute the values for the variables to make an actual path, from the point of view of the server where the Archiver_UI_Importer workflow runs. There are two pickup locations for this workflow:

- For View Transmission (Document), this will need to map to what the Archiver_UI_Importer workflow is expecting:
%FSSYSROOTDIR%%F\$WORKFLOW%\InSplit
 - For View Transmission (File), this will need to map to what the Archiver_UI_Importer workflow is expecting: **%FSSYSROOTDIR%%F\$WORKFLOW%\InNoSplit**
 - For Start Validation Highlighter, this is where the EDI_VH component expects to pick up the file: **%FSSYSROOTDIR%%F\$WORKFLOW%\InVH**
 - For Get Validation Highlighter, this is where the HTML_VH component contains the completed HTML report: **%FSSYSROOTDIR%%F\$WORKFLOW%\OutVH**
- %FSSYSROOTDIR%** maps to the Systems folder where the workflows reside:
ArchiverDemo.
- %F\$WORKFLOW%** maps to the name of this workflow:
Automator_UI_Importer.

InSplit and **InNoSplit** are the actual names of the folders.

For example, if your workflows are rooted in **/home/Foresight/Systems**, then the paths for these folders become

```
/home/Foresight/Systems/Archiver_UI_Importer/InSplit  
/home/Foresight/Systems/Archiver_UI_Importer/InNoSplit  
/home/Foresight/Systems/Archiver_UI_Importer/InVH  
/home/Foresight/Systems/Archiver_UI_Importer/OutVH
```

File Action

Checking the box means that you act on a whole file.

Document Action

This acts on an application document. Normally, this only makes sense in View Transmission (Document) and the two Validation Highlighter actions.

Input

Select one or more types of files passed to the action:

Primary	an EDI file that was archived with a matching DTL file
Detail	the validation detail file
Attachment	image or other attachment
Other	anything else

In the drop-down:

0	Not used
0 or more	Optional
1	One and only one is required
1 or more	One is required, more are optional

Edit

Use care when editing the default actions.

Delete

Do not delete the default actions.

Creating an Action

You can add other activities for your users:

1. Go to **Archive | Admin | Actions**.
2. Select **Add New Action**
3. Set up your action and click **Save**.
Please see the example below.
4. Go to **Common Administration | Roles**.
Edit each role that will be able to use this action, select the action, and save.

Example

We are going to create an action that sends a document to a particular directory for review by the EDI support team.

1. In Foresight Archive and Retrieval System, go to **Archive | Admin | Actions** and choose **Add New Action**

- Set up this new action, using a directory path from the point of view of Payara (Glassfish):

ID	Action Name	Description	Workflow Directory
1	View Transmission (File)	Import File	C:\TIBCO\System\Arch
2	View Transmission (Document)	Import Document	C:\TIBCO\System\Arch
3	Start Validation Highlighter	Start Generating VH report	C:\TIBCO\System\Arch
4	Get Validation Highlighter	Retreives VH Result	C:\TIBCO\System\Arch
0	Submit to Support	Bad Document Directory	C:\Support\BadDocs

- Choose **File Action** and set up the Input like this:

<input checked="" type="checkbox"/>	PRIMARY	1	▼
<input type="checkbox"/>	DETAIL	0 or more	▼
<input type="checkbox"/>	ATTACHMENT	0 or more	▼
<input type="checkbox"/>	OTHER	0 or more	▼

- Save.
- Be sure that the directory exists and has permissions that will allow users to save a file there.
- Under **Common Administration**, go to **Admin | Roles** and edit a role that should be able to use this action.
Under **Archive Action**, select **Submit to Support** and save.
- Log in as a user who has this role.
- Go to **Archive | Search | File Search** and find a file.

9. Click on the file to go to Archive Action, select the PRIMARY file, select any other file in its fileset, select the **Submit to Support** action, and click **Perform Action**.

Select	Name	Size
<input checked="" type="checkbox"/>	5010_850_1.edi	16319 bytes
<input checked="" type="checkbox"/>	5010_850_1.dtl	8618 bytes

[View in Operational Monitor](#)

Actions

Submit to Support ▼

Select an Action
View Transmission (File)
Submit to Support

Perform Action

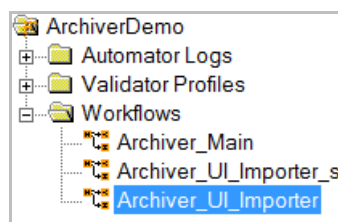
The file should now go to the directory we specified.

Debugging an Action

If an Action's Status remains In Progress and never becomes **Complete**, even after waiting the usual amount of time, and after clicking **Refresh**, check these:

- Be sure that the Archiver_UI_importer workflow is running.

Example:



- Be sure folders in the action exist and are writable:

Workflow Directory
C:\TIBCO\System\ArchiverDemo\Archiver_UI_Importer\InNoSplit
C:\TIBCO\System\ArchiverDemo\Archiver_UI_Importer\InSplit
C:\TIBCO\System\ArchiverDemo\Archiver_UI_Importer\InVH
C:\TIBCO\System\ArchiverDemo\Archiver_UI_Importer\OutVH
C:\Support\BadDocs

- Be sure that the Foresight Archive and Retrieval System portal's **Workflow Directory** and the workflow agree about the folder where the EDI file should go:

Component Name	
Name	Edi_NoSplit
Schedule Parameters	
Directory	%FSSYSROOTDIR%%FSSWORKFLOW%\InNoSplit
FileExtension	edi
Frequency	5

- Be sure the workflow is properly configured, including the database parameter for the Importers and TIUtilities.
- Look at the ArchiverWebServer.log file in Foresight Archive and Retrieval System's log directory.
- Use **Archive | Admin | Settings | Ping**.

Root Folders

To specify the location of the repository:

1. Log on to the Foresight portal as an administrator.
2. Click **Archive | Admin | Root Folders**.

You will see a page like this:

Archive Administration

SETTINGS ACTIONS **ROOT FOLDERS** FILTERS TEMPORARY IMAGE S

Root Folder	Folders Per Day	Files In Path
C:\TIBCO\Archiver\Data\Repository	2	85
/u05/home/lbrownst/tibco/Archiver/Repository	2	0

Add a new Root Folder ...

Active Root Folder

C:\TIBCO\Archiver\Data\Repository

Change Active Root Folder

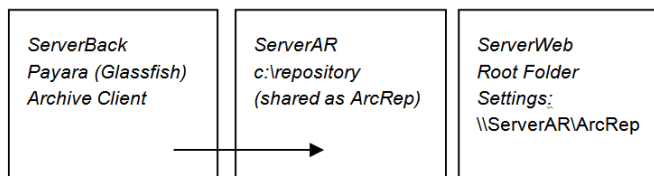
Where:

Root Folder

The path to the top level of the repository from the point of view of Payara (GlassFish) and the Foresight Archive and Retrieval System client.

Example

You, the administrator, log in to the portal on ServerWeb and set the root folder as \\ServerAR\ArcRep.



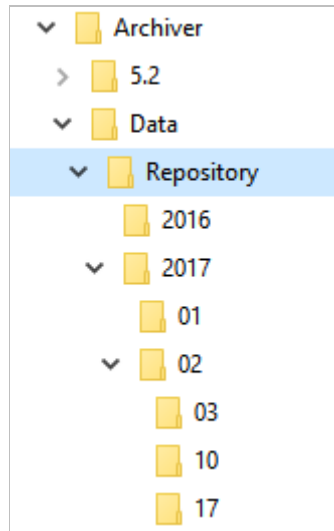
Be sure the path is in the format for that operating system (Unix or Windows format). ServerAR and ServerWeb must have the same operating system.

The network connection must be available after you log off.

Use care when editing or deleting root folders if you already have files in them. Foresight Archive and Retrieval System looks in these folders when it needs to use the repository.

This repository's root folder is

c:\TIBCO\Archiver\5.2\Data\Repository. Under this, Foresight Archive and Retrieval System automatically creates folders for year, month, day, and folders per day.



Folders Per Day

Specify how many folders should be created each day for archiving. This is an integer from 1 - 1440. Foresight Archive and Retrieval System divides the day up evenly into that many parts. For example, if you specify 12, Foresight Archive and Retrieval System creates a new folder every 2 hours.

Files in Path

Displays how many files are now in this repository.

Active Root Folder

The repository where Foresight Archive and Retrieval System is currently depositing files. However, Foresight Archive and Retrieval System uses information in its database to find files in any repository listed here.

To add a root folder:

- Create the root folder. You do not need to create any of the folders below it.
- The new root folder, and folders that will be created beneath it, must be accessible to the Foresight Archive and Retrieval System client and the web services hosted by Payara (Glassfish).
- Be sure you have sufficient space on the drive to handle the volume you expect.

To change the active root folder:

- Select it from the drop down list and click the Activate Root Folder button.
- This root folder must be accessible to the Foresight Archive and Retrieval System client and the web services hosted by Payara (Glassfish).

To edit a root folder's path:

- Do not edit the current root folder path. Only edit root folder paths that are not active.
- Before changing the root folder path, copy all of the files from the old root folder to the new root folder.
- The new root folder path must be accessible to the Foresight Archive and Retrieval System client and the web services hosted by Payara (Glassfish).
- Editing the root folder will NOT copy the files for you. It will change a row in the database.

To edit a “Folders Per Day” property:

- If you reduce the number of folders per day, some files will appear to be stored out of sequence on the day you make the change. However, there will be no problem accessing the data.
- On subsequent days, the sequencing will appear normal.

To delete a root folder:


- Only delete a root folder from the Root Folder page in testing situations where the repository is disposable.
- Once a root folder is removed from the database, there are no tools in the Foresight Archive and Retrieval System portal to restore it.
- Back up the affected repository.
- Deleting the root folder will NOT actually delete any files for you.
- Deleting the root folder will NOT remove references to it in the database. There could be many records that still refer to it.

Filters

Filters appear on the **Search | Filter Search** page to let you find files based on values in the data.

Universal Type Filters

These filters let you find files based on sender and receiver values in the enveloping of EDI documents. They are installed by default. If a non-EDI Archive Type is selected from the drop-down, these filters will not appear.

FILTER SEARCH		FILE SEARCH	SEARCH PREFERENCES	QUICK SEARCH (FILESET/FSUID)
Standard Type:	Archive Type - Version:	Start Date:		End Date:
All ▼	All ▼	10/22/2012		2/19/2013
Universal Type Filters				
Sender ID	X12	PRN:ISA06		
Receiver ID	X12	PRN:ISA08		
Sender Code	X12	PRN:GS02		
Receivers Code	X12	PRN:GS03		
Interchange Sender	EDIFACT	PRN:UNB2-1		
Interchange Recipient	EDIFACT	PRN:UNB3-1		
Application Sender	EDIFACT	PRN:UNG2-1		
Application Recipient	EDIFACT	PRN:UNG3-1		

Type Specific Filters

These are your own custom filters that are specific to **Archive Type-Version** that is chosen at the top of the **Filter Search** page. For details on setting these up, see **Filters_for_FPP.pdf**.

Standard Type:	Archive Type - Version:	Start Date:
X12	ANSI 850 - 005010	10/24/2012
Universal Type Filters		
Sender ID	X12	PRN:ISA06
Receiver ID	X12	PRN:ISA08
Sender Code	X12	PRN:GS02
Receivers Code	X12	PRN:GS03
Type Specific Filters		
850 Purchase Order Number BEG-03	X12	ZZT50

Listing all filters

Go to [Archive](#) | [Admin](#) | [Filters](#).

Transmission Level Filters		
External Reference	Description	Archive Type
PRN:ISA06	Sender ID	ANSI ALL
PRN:ISA08	Receiver ID	ANSI ALL
PRN:GS02	Sender Code	ANSI ALL
PRN:GS03	Receivers Code	ANSI ALL
PRN:UNB2-1	Interchange Sender	EDIFACT ALL
PRN:UNB3-1	Interchange Recipient	EDIFACT ALL
PRN:UNG2-1	Application Sender	EDIFACT ALL
PRN:UNG3-1	Application Recipient	EDIFACT ALL

Document Level Filters		
External Reference	Description	Archive Type
ZZT50	850 Purchase Order Number BEG-03	ANSI 850
SVALU:BEGBeginningSegment:3	850 Purchase Order Number BEG-03	ANSI 850

External Reference	The name of the filter.
Description	User-friendly description.
Archive Type	Type of data.
Edit	You can edit the Description here.

Adding Filters

This is a multi-step process that requires a database administrator and possibly guideline changes. Please see [Filters_for_FPP.pdf](#).

Temporary Image Storage

When an image is viewed, the file is stored in the temporary image folder after it has been brought over from the repository. The **Admin | Temporary Image Storage** page lets you monitor and clear out the contents of the temporary image folder.

The path was set up by Foresight Archive and Retrieval System and is relative to the portal server.

3 Allowing Access to the System Portal

Permissions

Permissions are set up under Common Administration's **Admin | Roles**. For specifics, please see Appendix D in **TIB_transactioninsight_*n.n*_commonadministration.pdf**.

System Administrator Permissions

Typical permissions for a Foresight Archive and Retrieval System administrator are:

Archive Action			
	View Transmission (File)	<input checked="" type="checkbox"/>	
	View Transmission (Document)	<input checked="" type="checkbox"/>	
	Start Validation Highlighter	<input checked="" type="checkbox"/>	Form View Level
	Get Validation Highlighter	<input checked="" type="checkbox"/>	Form Edit Level
	Submit to Support	<input checked="" type="checkbox"/>	
Archive Admin			
	Admin	<input checked="" type="checkbox"/>	
Archive User			
	Search	<input checked="" type="checkbox"/>	
	View File	<input checked="" type="checkbox"/>	
	View Transmission	<input checked="" type="checkbox"/>	

The Archive Admin permission does not give the any additional rights beyond its intended purpose. For example, it does not grant access to the Archive Search. Each permission required by a role must be explicitly defined.

Permissions

Typical permissions for a Foresight Archive and Retrieval System user are:

Archive Action	<div></div> <div>View Transmission (File) <input checked="" type="checkbox"/></div> <div>View Transmission (Document) <input checked="" type="checkbox"/></div> <div>Start Validation Highlighter <input checked="" type="checkbox"/></div> <div>Get Validation Highlighter <input checked="" type="checkbox"/></div> <div>Submit to Support <input checked="" type="checkbox"/></div>	Form View Level	100
		Form Edit Level	100
Archive Admin	<div></div> <div>Admin <input type="checkbox"/></div>		
Archive User	<div></div> <div>Search <input checked="" type="checkbox"/></div> <div>View File <input checked="" type="checkbox"/></div> <div>View Transmission <input checked="" type="checkbox"/></div>		

4 Logging

All Foresight Archive and Retrieval System functions (administrative, search, and view) are logged to Common Administration's **Admin | Settings | Event log**.

Foresight Archive and Retrieval System's logs are stored in Foresight Archive and Retrieval System's **Bin\log** and **Bin\logs** directories.

For information about workflow log files, please see **TIB_fsp_archive_#.##_archivesystems.pdf**.

5 Appendix A: Filtering

Technical Details

Filtering and Searching

Filtering is the process of extracting data items from files processed by Foresight Archive and Retrieval System and storing those data items in the database. These data items are associated with the files that contained them.

During installation a set of default filters is created that applies to all EDI-based detail files. These will cause the Foresight Archive and Retrieval System importer to extract the ISA06, ISA08, GS02, GS03 elements.

This information is stored in Foresight Archive and Retrieval System's ArchiveTypes table:

	ArchiveTypeID	ArchiveTypeNa...	DataStand...	DataVersion	Transaction.
56	56	ANSI 837D	EDI	005010X224A1	837
57	57	ANSI 997	EDI	005010A1	997
58	58	ANSI 999	EDI	005010X231A1	999
59	59	ANSI 834	EDI	005010X220A2	834
60	60	ANSI 835	EDI	005010X221A2	835
61	61	ANSI 837I	EDI	005010X223A2	837
62	62	ANSI 837P	EDI	005010X222A2	837
63	63	ANSI 837D	EDI	005010X224A2	837

DataVersion is the GS08 value, and **TransactionSet** is the ST01.

If a file's GS08 and ST01 are not in this table, the table is automatically updated with the new information. It will then appear in the Search filters:

The screenshot shows a web interface for 'Archive Search'. It has three tabs: 'FILTER SEARCH' (selected), 'FILE SEARCH', and 'SEARCH PREFERENCE'. Below the tabs, there are two dropdown menus. The first is labeled 'Standard Type:' and has 'X12' selected. The second is labeled 'Archive Type - Version:' and has 'ANSI 270 - 004010X092' selected. A mouse cursor is pointing at the second dropdown menu.

Working with an experienced database administrator, you can use the **MakeFilter** stored procedure to create additional filters and use the DropFilter stored procedure to delete them.

Searching is the process of retrieving specific archived files based on the data items that were extracted from the inbound files.

How Filters are Assigned to Documents being Archived

When the Foresight Archive and Retrieval System client imports a file, it uses values from its input files to find a row in the ArchiveTypes table.

1. For EDI, when Foresight Archive and Retrieval System starts processing a detail file, it looks at its GS08 to determine its version and transaction.

For example, it might encounter *004010X096A1*, which would indicate that it is processing a 4010 837I document.

2. It then looks in the ArchiveTypes table to find a reference to this document type (ArchiveTypeId=2).

ARCHIVETYPEID	ARCHIVETYPENAME	DATASTANDARD	DATAVERSION	TR
1	ANSI 837P	EDI	004010X098A1	837
2	ANSI 837I	EDI	004010X096A1	837

If there is no match, it will throw an exception and exit.

3. It then retrieves all rows from the ArchiveFilterMap table that match on the document type.

ARCHIVEFILTERID	EXTERNALREFERENCE	ARCHIVEREFERENCE	ISDOCLEVEL	DESCRIPTION	ARCHIVETYPEID
1	19 ZT28	DOCFILTER005	1	837I Billing Provider Tax ID	2
2	20 ZT52	DOCFILTER006	1	837I COBA ID	2
3	21 SVALU:S009	DOCFILTER007	1	Subscriber Claim	2

4. It checks the detail file for values from the ExternalReference column. In the example above, this is ZZT28, ZZT52, and SVALUS009. If it finds a matching line, it places that line in the table named in the ARCHIVERREFERENCE column.
5. For each EDI file, Foresight Archive and Retrieval System always captures the values in the ISA06, ISA08, GS02, and GS03, so users will have them as search filters.

ArchiveTypes Table

Filtering starts with the table **ArchiveTypes**. This table is used to classify a file that will be handled by Foresight Archive and Retrieval System. It consists of these columns:

ArchiveTypeID	System generated identifier.
ArchiveTypeName	General identifier for this row, such as ANSI 837P. For Flat files, this is FLAT . For XML files, this is XML . It may also be OTHER for files that were processed outside of TIBCO Foresight® Instream®.
DataStandard	Type of data, such as EDI, XML, FLAT, or OTHER.
DataVersion	For EDI, this is the GS08 value. For XML and FLAT, this is the standard that appears in the detail file (described below). This can also be ALL.
TransactionSet	For EDI this is the ST01 value. It may also be ALL to refer to all EDI transaction sets. For Flat files, this is FLAT. For XML files this is XML.

This table is initialized when the Foresight Archive and Retrieval System database is created. Look at the file **ArchiverCreateSchema.sql** for the INSERT statements that populate this table.

For SQL Server, here are a few examples:

```
INSERT INTO [ArchiveTypes] ([ArchiveTypeName], [DataStandard],
[DataVersion],[TransactionSet]) VALUES ('ANSI 837P', 'EDI',
'004010X098A1','837')
```

```
INSERT INTO [ArchiveTypes] ([ArchiveTypeName], [DataStandard],
[DataVersion],[TransactionSet]) VALUES ('ANSI 837I', 'EDI',
'004010X096A1','837')
```

This table should be checked to be sure that it covers all data types that a customer will be handling.

Each row must be unique. If you reload the database, there will be duplicates and Foresight Archive and Retrieval System will fail.

Foresight Archive and Retrieval System Client and the ArchiveTypes Table

To determine the type of file to be processed, (FLAT, EDI, XML), Foresight Archive and Retrieval System will parse the inbound detail file and look for one of the following records:

XML File	<p>Foresight Archive and Retrieval System uses the standard from the GEN record 11001 to determine the filter set. This includes:</p> <pre>from Standard <standardName><blank>(XML)</pre> <p>When it queries the database for this file, it will look for a record where the transaction set is XML, the Data Standard is XML, and the DataVersion is <standardName>.</p>
Flat File	<p>For Flat Files, it looks for a GEN record with the number 11001 that includes the text:</p> <pre>from Standard <standardName><blank>(Date=yyyymm/dd hh:mm).</pre> <p>When it queries the database for this file, it will look for a record where the transaction set is FLAT, the Data Standard is FLAT, and the DataVersion is <standardName>.</p>
EDI File	<p>For EDI-based detail files, Foresight Archive and Retrieval System always records the ISA06, ISA08, GS02, GS03 values. It uses the GS08 and ST01 fields to clarify the type. Foresight Archive and Retrieval System also records the entire payload of SVALU and ZZT records for which an archive filter has been set up.</p>

ArchiveFilterMap Table

This table contains the filtering data for Foresight Archive and Retrieval System. Its columns are

ArchiveFilterID	System generated identifier.
ExternalReference	<p>The filter. This is the column where the filter is defined.</p> <p>Currently these are the values that can be in here.</p> <p>PRN:ISA06, PRN:ISA08, PRN:GS02, PRN:GS03. These are the familiar Sender and Receiver fields from an EDI document. These are applied to all EDI documents.</p> <p>SVALU: <i>svalue</i>. This is an SVALU record from a detail file. Example: SVALU:S009</p> <p>ZZT<i>nn</i>. A ZZT record. Example: ZZT28.</p>
ArchiveReference	The table where the data that passes this filter will reside.
IsDocLevel	IsDocLevel=1 indicates that every instance of a filter will be captured. IsDocLevel=0 means capture only the first one.
Description	A user-friendly string that will appear on the portal to identify this filter.
ArchiveTypeId	A reference back to the ArchiveTypes table.

When the Foresight Archive and Retrieval System client processes a file, it first finds a row from the ArchiveTypes table and then uses it to get the filters for the file. It applies each filter to each line in the inbound file. If there is a match, it will write the relevant data from the line to the table defined for this filter.

Loading the Filter Map Table

The MakeFilter and DropFilter stored procedures in the Foresight Archive and Retrieval System database are used to manage the ArchiveFilterMap table.

MakeFilter

As the name implies, this stored procedure is used to add an item to the ArchiveFilterMap table. It takes the following parameters:

- The filter
- The name of the table that will hold items that match the filter
- A flag indicating if all instances of filtered items in the validation detail file will be added to the table or just one.
- A user-friendly description of the element.
- The data version and data set – these are used to find a row in the ArchiveTypes table.

When this stored procedure executes, it will

1. Try to find a match in the ArchiveTypes table for the data version and data set.
2. Insert a row into the ArchiveFilterMap table.
3. Create a table for the filtered data.
4. Create indexes for several of the columns in the table
5. For Oracle, it will also add a sequence and a trigger.

SQL Server Example

The stored procedure would be invoked as

```
EXECUTE MakeFilter
'ZZT28',           -- the filter
'DOCFILTER005',    -- the table for this filter
1,                 -- indicates that all instances will be used
'837I Billing Provider Tax ID', --the description
'004010X096A1',    -- the data version
'837';             -- the data set
```

Oracle Example

```
CALL <schemaName>.MakeFilter(  
'ZZT28',           -- the filter  
'DOCFILTER005',    -- the table for this filter  
1,                 -- indicates that all instances will be used  
'837I Billing Provider Tax ID', --the description  
'004010X096A1',    -- the data version  
'837';            -- the data set  
);
```

The data version and data set indicate that this filter would be applied to any file that is an EDI 837I 4010. The filter is ZZT28, a user-defined transaction filter for these sorts of files. DOCFILTER005 is the name of the table that will contain all of the filtered data for this filter.

The naming conventions for the tables are:

DOCFILTER nnn	when the IsDoc field is 1. nnn is some number from 000 to 999. This means the data is an application document.
TRANSFILTER nnn	when the IsDoc field is 0. nnn is some number from 000 to 999. This means the data is an entire file.

Do not re-use or overload tables. For example, if there is a filter named ZZT52 for both EDI 837I and EDI 837P, use separate tables for each of them.

Note: On Oracle, this can be run by any user that has rights to create objects in the Foresight Archive and Retrieval System schema.

The parameters for this file and examples of how to use it are documented extensively in the file **ArchiverLoadFilterMaps.sql**, which is in Foresight Archive and Retrieval System's DBScripts directory.

SQL Server example

```
EXECUTE MakeFilter 'ZZT28',           'DOCFILTER005',  
                1, '837I Billing Provider Tax ID', '004010X096A1', '837';  
  
EXECUTE MakeFilter 'ZZT52',           'DOCFILTER006',  
                1, '837I COBA ID', '004010X096A1', '837';  
  
EXECUTE MakeFilter 'SVALU:S009',      'DOCFILTER007',      1,  
                'Subscriber Claim',  
                '004010X096A1', '837';
```

Oracle example

```
call ARCHIVERE2E.MakeFilter('ZZT28',          'DOCFILTER005',          1,
                           '837I Billing Provider Tax ID', '004010X096A1', '837');

call ARCHIVERE2E.MakeFilter('ZZT52',          'DOCFILTER006',          1,
                           '837I COBA ID',      '004010X096A1',
                           '837');

call ARCHIVERE2E.MakeFilter('SVALU:S009',      'DOCFILTER007',          1,
                           'Subscriber Claim',  '004010X096A1', '837');
```

Filters have to correspond to what guidelines put into the validation detail files. In the examples above, these filters will only be useful if some detail files actually contained ZZT28 or ZZT52 records, or SVALU S009 records.

Please feel free to contact Foresight support for guidance. Appendix A in Common Administration contains some information that may be helpful in generating Z records.

DropFilter

This stored procedure is used to remove a filter (and its associated table) from the database. It takes one parameter, the ArchiveFilterId from the ArchiveFilterMap table.

Searching - Technical Details

In the Foresight Archive and Retrieval System Portal, there are two kinds of searches:

- Filter search - configurable
- File search - no setup required. Files are found by attributes like file size, dates, etc.

Filter Search

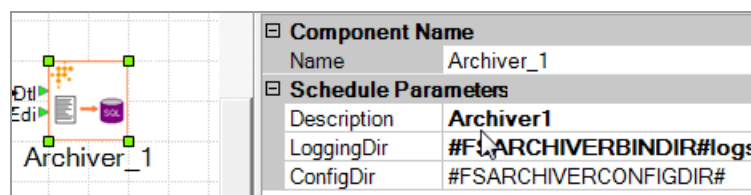
A **Filter Search** lets the user select the document type that they are searching for and then enter search values into the pre-defined search filters for that document type.

All EDI documents types have a common set of filters known as **Universal Filters** and then specific document types have **Type Specific Filters**.

FILTER SEARCH		FILE SEARCH	SEARCH PREFERENCES	QUICK SEARCH (FILESET/FSUID)	
Standard Type:	Archive Type - Version:	Start Date:	End Date:	Imported By:	
All	All	12/25/2014	4/24/2015		
Universal Type Filters					
Sender ID	X12	PRN:ISA06			
Receiver ID	X12	PRN:ISA08			
Sender Code	X12	PRN:GS02			
Receivers Code	X12	PRN:GS03			
Interchange Sender	EDIFACT	PRN:UNB2-1			
Interchange Recipient	EDIFACT	PRN:UNB3-1			
Application Sender	EDIFACT	PRN:UNG2-1			
Application Recipient	EDIFACT	PRN:UNG3-1			
<input type="button" value="Search"/>					

The filters at the top include:

- **Archive Type** - Document type. See below.
- **Start Date** and **End Date** – Range during which the file was archived.
- **Imported By** – Identifying label for a workflow or API that imported the data.
In this workflow example, the Imported By value is Archiver1:



Aside from the four Universal Type Filters above, all filters are custom.

The filters use both the ArchiveTypes and ArchiveFilterMaps tables in the Foresight Archive and Retrieval System database.

Archive Type

In the example above, **Archive Type** drop down list comes from the ArchiveTypes table:

ArchiveTypeID	ArchiveTypeName	DataStandard	DataVersion	TransactionSet
1	ANSI 837P	EDI	004010X098A1	837
2	ANSI 837I	EDI	004010X096A1	837
3	ANSI 835	EDI	004010X091A1	835
4	ANSI ALL	EDI	ALL	ALL
5	ANSI 837D	EDI	004010X097A1	837
6	OTHER	OTHER	OTHER	OTHER

The EDI **Universal Type Filters** come from the ArchiveFilterMap table where the ArchiveTypeId = 4.

ArchiveFilterID	ExternalReference	ArchiveReference	IsDocLe...	Description	ArchiveTypeID
16	PRN:ISA06	TRANSFILTER001	0	Sender ID	4
17	PRN:ISA08	TRANSFILTER002	0	Receiver ID	4
18	PRN:GS02	TRANSFILTER003	0	Sender Code	4
19	PRN:GS03	TRANSFILTER004	0	Receivers Code	4

The **Type Specific Filters** come from the ArchiveFilterMap where the ArchiveTypeId =2, which is the ID for 837I 4010 documents.

When the Foresight Archive and Retrieval System client parses a detail file, it will look for any line that matches these filters. When it finds one it will insert the relevant data into the table identified by the ArchiveReference column. For example, if the detail file contained this line for the GS segment

```
SVALU          2|GSSG|0|GS*HS*HealthProvider*HealthInsurance*
20060110*1615*27000001*X*004010X092A1
```

The table TRANSFILTER003 would contain in its FilterData column the value **Health Provider**. The table TRANSFILTER004 would contain in its FilterData column the value **Health Insurance**. To get a match on either of these, the user would enter **Health Provider** or **Health Insurance** into the appropriate text box.

If the detail file contained the line

```
SVALU          30|S009|171|CLM*837I_P1_S1_C1*111.11***21:A:1*N**Y*A*****N
```

The table DOCFILTER007 would contain in its FilterData column the value

```
CLM*837I_P1_S1_C1*111.11***21:A:1*N**Y*A*****N
```

To get a match on this, the user would need to enter this entire search string into the appropriate search box:

```
CLM*837I_P1_S1_C1*111.11***21:A:1*N**Y*A*****N
```

File Search

File Search allows you to find files stored in the Foresight Archive and Retrieval System database by searching for certain attributes.

- File Name search accepts multiple uses of the “*” wild card character.
- Archived Date and Last Modified Date searches allow for a start and end date.

Access this page using **Search | File Search**.

FILTER SEARCH		FILE SEARCH	SEARCH PREFERENCES	QUICK SEARCH (FILESET/FSUID)
File Name	like	<input type="text"/>	(Use "*" as the wild card.)	
File Size	=	<input type="text"/>	bytes	
Archived Date	Start:	<input type="text" value="2/23/2015"/>	End:	<input type="text" value="4/24/2015"/>
Last Modified Date	Start:	<input type="text"/>	End:	<input type="text"/>
<input type="button" value="Search"/>				

File Name

File Name	like	<input type="text"/>	(Use "*" as the wild card.)
-----------	------	----------------------	-----------------------------

The file name search allows for multiple uses of the wild card character (“*”) anywhere in the character string. This enables the return of a smaller, more precise result set.

Note: Remember that broader search criteria will result in longer response times and larger result sets.

Entering this file name...	Will search for...	Example file name(s) returned
Hillsdale625-1a.edi	an exact name match.	Hillsdale625-1a.edi
Hillsdale625-1a.*	an exact name match of any file type.	Hillsdale625-1a.edi Hillsdale625-1a.dtl
Hillsdale625-1*.edi	any file beginning with Hillsdale625-1 and ending with .edi.	Hillsdale625-1.edi Hillsdale625-1a.edi Hillsdale625-1b.edi
Hill*625-1a.edi	any file beginning with Hill and ending with 625-1a.edi.	Hillsdale625-1a.edi HillMed625-1a.edi

File Size

File size allows you to search for a file based the size of the file in bytes.

File Size	=	<input type="text"/>	bytes
-----------	---	----------------------	-------

Archived Date

Archived Date	Start:	<input type="text" value="2/23/2015"/>		End:	<input type="text" value="4/24/2015"/>	
---------------	--------	--	--	------	--	---

Archived Date allows you to search for a file based on the date the file was stored in the Foresight Archive and Retrieval System database. The End date field is pre-populated with the current date and the Start date field is pre-populated with a date corresponding to the number of days to search back as specified in the **Search Page Default Date Days** setting (see Settings on page 7). You can also manually enter a start and end date.

Last Modified Date

Last Modified Date	Start:	<input type="text"/>		End:	<input type="text"/>	
--------------------	--------	----------------------	--	------	----------------------	---

Last Modified Date allows you to search for a file based on the date file was last modified in the system. Manually enter a start and end date.

6 Appendix B: Foresight Archive and Retrieval System API

API Components

Component	Description	See Page ...
Archiver API Class	Customer applications can link this into their Java applications and use it to import any type of file.	42
Metadata File	This describe the files being archived. This data can be used later to restore files in the Foresight Archive and Retrieval System portal.	43
JavaDocs	Please look in Transaction Insight's Documentation\Javadocs folder. Example: C:\TIBCO\TransactionInsight\5.2\Documentation\Javadocs	

Archiver API Class

Use the **ArchiverAPI** class from Archiver.jar in Foresight Archive and Retrieval System's Java directory to invoke the **archive** method.

Using a Job ID:

archive

```
public java.lang.String archive(java.lang.String fileName,
                               java.lang.String metadataFile,
                               java.lang.String configFolder,
                               java.lang.String logFolder,
                               java.lang.String description,
                               java.lang.String jobId)
    throws java.lang.Exception
```

Call this method to run the archiving operation using a metadata file for filter specification. The use of the jobId parameter indicates that you want to this archived file to belong to an existing fileset identified by the jobId.

Parameters:

fileName - name of file to be archived.
metadataFile - name of file containing meta-data information about the archiving operation.
configFolder - folder where the Archiver configuration files are installed.
logFolder - folder where the log file will be written.
description - a descriptive name for this archiving operation.
jobId - the job id that was either passed in or generated.

Returns:

jobid i.e. the GUID that will be used in the fileset table.

Throws:

java.lang.Exception - invalid or non-existent command line parameters, permissions issues, archiver operations failed

Not using a Job ID:

archive

```
public java.lang.String archive(java.lang.String fileName,
                               java.lang.String metadataFile,
                               java.lang.String configFolder,
                               java.lang.String logFolder,
                               java.lang.String description)
    throws java.lang.Exception
```

Call this method to run the archiving operation using a metadata file for filter specification. This will create a new fileset in the archiver identified by the jobId that is returned to the calling application.

Parameters:

fileName - name of file to be archived.
metadataFile - name of file containing meta-data information about the archiving operation.
configFolder - folder where the Archiver configuration files are installed.
logFolder - folder where the log file will be written.
description - a descriptive name for this archiving operation.

Throws:

java.lang.Exception - invalid or non-existent command line parameters, permissions issues, archiver operations failed

Metadata File

This is a standard Java properties file. It provides a set of filter data that corresponds to the filters in the ArchiveFilterMap table in the database.

The property keys will be pre-defined and loaded into the Foresight Archive and Retrieval System database using the same methods we currently use for filtering Instream® results files in a workflow.

The basic format of the file is:

```
data.standard=dataStandard
data.version=dataVersion
data.transactionSet=TransactionSet
filterDescription1=value
filterDescription2=value
...
```

The order is not significant, but these properties are required:

data.standard	This can be any value in the DataStandard column of the ArchiveTypes table, including any value that you add.
data.version	This can be any value in the DataVersion column of the ArchiveTypes table, including any value that you add.
data.transactionSet	This can be any value in the TransactionSet column of the ArchiveTypes table, including any value that you add.
filterDescription1	This can be any value in the Description column of the ArchiveFilterMap table that corresponds to the ArchiveTypeID values that you are using. These are defined in the ArchiveTypes table.

These values will populate one row in the ArchiveTypes table.

Example

The customer wants to archive 5010 837I files. The filters defined in the database might be something like the following. The first table shows the ArchiveTypes table. The second table shows the ArchiveFilterMap table.

Results		Messages			
	ArchiveTypeID	ArchiveTypeName	DataStandard	DataVersion	TransactionSet
1	4	ANSI ALL	EDI	ALL	ALL
2	15	ANSI 837I	EDI	005010X223A1	837

	description	archivetypeid
1	Sender ID	4
2	Receiver ID	4
3	Sender Code	4
4	Receivers Code	4
5	L2300-CLM07: Provider Accept_Assignment Code	15
6	L2430-CAS01: Claim Adjustment Group Code	15
7	L2430-CAS02: Claim Adjustment Reason Code	15
8	Delay Reason Code	15
9	L2000B-2300-CLM: Subscriber Claim	15
10	L2000C-2300-CLM: Patient Claim	15

The metafile would look something like this:

```
data.standard=EDI  
data.version=005010X223A1  
data.transactionset=837  
Sender ID=123456789  
Receiver ID=987654321  
Sender Code=abcdef  
Receivers Code=zyx  
Delay Reason Code=0003  
L2430-CAS01: Claim Adjustment Group Code=91  
L2000B-2300-CLM: Subscriber Claim=2011-09-29-000324
```


Creating an Application

Customers can create an application by adding the following Java jar files to their build.

Jar File	Location
Archiver.jar	Foresight Archive and Retrieval System's Java directory
ForesightCoreLibrary.jar	Foresight Archive and Retrieval System's Java/lib directory
log4j-1.2.15.jar	Foresight Archive and Retrieval System's Java/lib directory
mail.jar	Foresight Archive and Retrieval System's Java/lib directory
Jdbc driver	ojdbc6.jar for Oracle or sqljdbc4.jar for Sql Server. The customer will need to install these. They are typically installed in Foresight Archive and Retrieval System's Java/lib directory

The Configuration Folder is usually Foresight Archive and Retrieval System's Bin directory. This is where the files **archiver.properties** and **archiverLogConfig.properties** are installed. If you want to use another folder, then you will need to add these two files to that folder.

Example

```
package com.mycompany.myarchiver
import com.foresightcorp.archiver.api.ArchiverAPI;
public class Main
{
    public static void main(String[] args) throws Exception
    {
        // setup the basic parameters
        String fileName = ".\\test\\FileToBeArchived.txt";
        ① String metadataFile = ".\\test\\Edi.metadata";
        ② String configFolder = ".\\test";
        String logFolder = ".\\test\\logs";
        ③ String description = "test archiver";

        ArchiverAPI api = new ArchiverAPI();

        ④ // try it with the job id specified
        String returnedJobId = "";
        returnedJobId = api.archive(fileName, metadataFile, configFolder,
            logFolder, description,
            "d5ed1099-6bb4-45b0-8989-9e670d6fc745");
        System.out.println("jobid=" + returnedJobId);

        ⑤ // or don't specify a job id
        returnedJobId = api.archive(fileName, metadataFile, configFolder,
            logFolder, description);
        System.out.println("jobid=" + returnedJobId);
    }
}
```

Where:

- ① Identifies the metadata file that contains filtering information.
- ② Location of **archiver.properties** and **archiverLogConfig.properties** are installed – usually Foresight Archive and Retrieval System’s Bin directory.
- ③ Optional description that shows up in the **Imported By** field of the **Filter Search** page.
- ④ Example where a FSUID-format job ID is specified.
- ⑤ Example where the job ID is not specified. It will be automatically assigned and returned to the program.

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