TIBCO Foresight® Transaction Insight®

Common Administration

Software Release 5.2
September 2017

Two-Second Advantage®

Important Information

SOME TIBCO SOFTWARE EMBEDS OR BUNDLES OTHER TIBCO SOFTWARE. USE OF SUCHEM BEDDED OR BUNDLED TIBCO SOFTWARE IS SOLELY TO ENABLE THE FUNCTIONALITY (OR PROVIDE LIMITED ADD-ON FUNCTIONALITY) OF THE LICENSED TIBCO SOFTWARE. THE EMBEDDED OR BUNDLED SOFTWARE IS NOT LICENSED TO BE USED OR ACCESSED BY ANY OTHER TIBCO SOFTWARE OR FOR ANY OTHER PURPOSE.

USE OF TIBCO SOFTWARE AND THIS DOCUMENT IS SUBJECT TO THE TERMS AND CONDITIONS OF A LICENSE AGREEMENT FOUND IN EITHER A SEPARATELY EXECUTED SOFTWARE LICENSE AGREEMENT, OR, IF THERE IS NO SUCH SEPARATE AGREEMENT, THE CLICKWRAP END USER LICENSE AGREEMENT WHICH IS DISPLAYED DURING DOWNLOAD OR INSTALLATION OF THE SOFTWARE (AND WHICH IS DUPLICATED IN THE LICENSE FILE) OR IF THERE IS NO SUCH SOFTWARE LICENSE AGREEMENT OR CLICKWRAP END USER LICENSE AGREEMENT, THE LICENSE(S) LOCATED IN THE "LICENSE" FILE(S) OF THE SOFTWARE. USE OF THIS DOCUMENT IS SUBJECT TO THOSE TERMS AND CONDITIONS, AND YOUR USE HEREOF SHALL CONSTITUTE ACCEPTANCE OF AND AN AGREEMENT TO BE BOUND BY THE SAME.

This document contains confidential information that is subject to U.S. and international copyright laws and treaties. No part of this document may be reproduced in any form without the written authorization of TIBCO Software Inc.

TIBCO, Two-Second Advantage, TIBCO Foresight Archive and Retrieval System, TIBCO Foresight BI Bridge – BAM, TIBCO Foresight EDISIM, TIBCO Foresight Instream, TIBCO Foresight Operational Monitor, TIBCO Foresight Studio, TIBCO Foresight Test Asset Management Suite, and TIBCO Foresight Transaction Insight are either registered trademarks or trademarks of TIBCO Software Inc. in the United States and/or other countries.

Enterprise Java Beans (EJB), Java Platform Enterprise Edition (Java EE), Java 2 Platform Enterprise Edition (J2EE), and all Java-based trademarks and logos are trademarks or registered trademarks of Oracle Corporation in the U.S. and other countries.

The United States Postal Service holds the copyright in the USPS City State Zip Codes. (c) United States Postal Service 2017.

All other product and company names and marks mentioned in this document are the property of their respective owners and are mentioned for identification purposes only.

THIS SOFTWARE MAY BE AVAILABLE ON MULTIPLE OPERATING SYSTEMS. HOWEVER, NOT ALL OPERATING SYSTEM PLATFORMS FOR A SPECIFIC SOFTWARE VERSION ARE RELEASED AT THE SAME TIME. SEE THE README FILE FOR THE AVAILABILITY OF THIS SOFTWARE VERSION ON A SPECIFIC OPERATING SYSTEM PLATFORM.

THIS DOCUMENT IS PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT.

THIS DOCUMENT COULD INCLUDE TECHNICAL INACCURACIES OR TYPOGRAPHICAL ERRORS. CHANGES ARE PERIODICALLY ADDED TO THE INFORMATION HEREIN; THESE CHANGES WILL BE INCORPORATED IN NEW EDITIONS OF THIS DOCUMENT. TIBCO SOFTWARE INC. MAY MAKE IMPROVEMENTS AND/OR CHANGES IN THE PRODUCT(S) AND/OR THE PROGRAM(S) DESCRIBED IN THIS DOCUMENT AT ANY TIME.

THE CONTENTS OF THIS DOCUMENT MAY BE MODIFIED AND/OR QUALIFIED, DIRECTLY OR INDIRECTLY, BY OTHER DOCUMENTATION WHICH ACCOMPANIES THIS SOFTWARE, INCLUDING BUT NOT LIMITED TO ANY RELEASE NOTES AND "READ ME" FILES.

Copyright © 2010-2017 TIBCO Software Inc. All rights reserved.

TIBCO Software Inc. Confidential Information

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
(Note: Entry to this site requires a username and password. If you do not have one, you can request one. You must have a valid maintenance or support contract to use this site.)

Contents

1 Introduction 1

Document Purpose 1
Two Versions of Transaction Insight® 2
Administrator's Job....2
Tutorial 2
Demo Data and your Company's Data 2

2 Tutorial 3

Tutorial Overview 3
View the Tutorial EDI Files....3
Set up an Administrative User for the Tutorial 4
Tutorial Partners....5
Tutorial Users....8
    Setting up a Role for Hillsdale Users....8
    Setting up a Group of Partners for Hillsdale Users 9
    Setting up Hillsdale Users 10
Tutorial Teams 11
Changing the Workflow....13
Importing Data....15
Viewing Transmissions 16
Viewing Top Errors....18
Viewing Statistics 19
Viewing Success Rate 21
Viewing and Fixing Errors 21

3 Basics 25

Logging in....25
Using the TIBCO Foresight Portal Platform 26
Entering Common Administration 27
Creating an Administrative User 27
Password Changing, Expiration and Deactivation....28
Administrative Pages 29
Navigating 30
Selecting from a List....32
Dates and Times....32
    Validation Dates 33
    Dates from EDI Data 34
Inbound and Outbound Documents....35
E-mails 37

4 Administrator Pages 39

List of Administrative Pages....39
Partners....40
Internal and External Partners....40
What every Partner Needs....41
Setting up a Partner....41
Partner Groups....46
Maintaining Partners....50
Errors in Partner Assignment....50
Roles....51
Defining a Role....51
Assigning a Role to a User....51
Users....52
Setting up New Users....52
Maintaining Users....55
Filters....55
Setting up Partner Filters....56
Maintaining Partner Filters....61
Setting up Transaction Filters....61
Maintaining Transaction Filters....61
Setting up Group Filters....62
Maintaining Group Filters....63
Teams....64
What are Teams?....64
Setting up New Teams....65
How Tasks are Assigned to Teams....71
Team Discard....72
Root Team....72
Maintaining Teams....73
Team Role Changing and Assigning Chart....73
Using My Tasks....73
Settings....74
Event Log....75
General Settings....77
Statuses / Priorities....83
Template Roles....84
Messages....85
Document Fields....85
Error Settings....87
External System Setting....88
Portals....88
LDAP Settings....89
Transaction Sets....92
Cache....98
About....98
Alerts....99
Setting up an Alert....99
Configuring Alert Emails....104
My Account....106
DRG Setup....106

Allow DRG Usage Page 106
Create Transaction Filters 107
Set up DRG Filters in Portal 108
Test the DRG Page 109

5 Managing Statistics, Tasks, and Files Pages 111

Overview of Transaction Insight Pages 111
Managing the Statistics Pages 112
Managing the Tasks Pages 113
Managing the Search Documents and Search Transmissions Pages 115
Managing the Files Pages 116

6 Appendix A - Using Custom Records to Identify Partner Data 117

Custom Records Overview 117
Steps in Identifying Sender or Partner by Custom Record 118
Preparing the Guideline 118
Merging the Guideline 121
Specifying Custom Record Values for Partners 122
Validating and Sending the Detail File 123

7 Appendix B - Partner Assignment Errors 125

Partner Assignment Error Causes 125
Moving Data to the Correct Sender or Receiver 125
If the Correct Partner does not Exist in Transaction Insight 126
Moving Data to a Partner that already exists 127
Checking the Values that Identify the Correct Partner 128
Checking Moved Data 129
Deleting Unwanted Partners 129
Diagnosing Partner Assignment Errors 130

8 Appendix C - Permissions 131

Portal Permissions 131
User Permissions 131
Admin Permission 132
Archive Action Permissions 132
Archive Admin Permission 135
Archive User Permissions 135
Files Permissions 136
OpMon User Permission 137
Search Permission 137
Statistics Permissions 138
Tasks Permission 139
Form View and Form Edit Permissions 139
Team Role Permissions 140
Permissions for Team Documents 141
Permissions for Forms 142

9 **Appendix D - Administrator's Guide to Forms and Views** **145**

EDI Viewing Formats 145
Configuration 146
Accessing and Editing Information 147
Form View 148
Paged Form View 149
Structured EDI View 150
Raw EDI View 151
Validation Highlighter View 152
Warnings on HIPAA Forms and Errors Not In Form 153
Controlling a User's Access to Form, Paged Form, and Errors Not in Form Fields 154
Giving Form Permission to a User 154
Setting Access Levels for Form Fields 154
Force Through 157
Opening a Form 158
HIPAA Forms 158

10 **Appendix E – Adding Notes to Documents** **161**

Where to see Notes 161
Setting up External Notes 161
Adding a Note 162

11 **Appendix F – Extended Fields** **165**

What is an Extended Field? 165
Extended Fields versus Transaction Filters 165
HIPAA and "Known Types" of Transactions 166
EDIFACT Messages and Generic X12 Transactions 167
Testing the Extended Fields 168

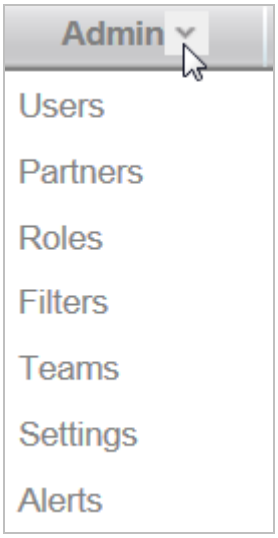
12 **Appendix G - Exception Page Customization** **169**

Overview 169
Specifying the Exception Condition Page 169
Editing the Exception Condition Page 171

1 Introduction

Document Purpose

This document is for administrators of the TIBCO Foresight® Transaction Insight® and the TIBCO Foresight Portal Platform. It describes how to use these Admin pages:



Other pages are described in **TIB_transactioninsight_*version*_usersguide.pdf**.

Configuration information is in **TIB_transactioninsight_*version*_installation.pdf**.

Two Versions of Transaction Insight®

Transaction Insight is available in two versions: **Transaction Insight Standard Edition** and **Transaction Insight Healthcare Edition**. Some information in this document pertains only to Transaction Insight Healthcare Edition and is noted appropriately.

Ensure that your system settings are correct (Healthcare/NonHealthcare) for the version of Transaction Insight you've purchased.

For more information refer to General Settings on page 77.

Administrator's Job

As administrator, you will set up and maintain users, partners, roles, filters, teams, settings, and alerts for the TIBCO Foresight Portal Platform, which includes any or all of these: Transaction Insight, TIBCO Foresight® Operational Monitor, and TIBCO Foresight® Archive and Retrieval System.

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

Tutorial

This document includes a tutorial. We recommend that you use it as the fastest way to become proficient with Common Administration and Transaction Insight.

Demo Data and your Company's Data

Your Transaction Insight installation may come with demo data in its database. Before starting production with your own company data, be sure that Transaction Insight has been switched to an empty Transaction Insight database. Do not mix your own data with the demo data.

You also have demo EDI files and guidelines in Transaction Insight's **DemoData** directory. See View the Tutorial EDI Files on page 3.

2 Tutorial

Tutorial Overview

This tutorial will go through all major steps in setting up a new partner, Hillsdale Market, which sends data to a Transaction Insight host, TopCat Manufacturing:

- Set up new partners Hillsdale Market and Topcat Manufacturing
- Set up new users from Hillsdale Market
- Set up a method for Hillsdale to correct bad data.

When finished, we will load Hillsdale files into Transaction Insight and view the data.

View the Tutorial EDI Files

Transaction Insight comes with sample 837I files for this tutorial. They are located under Transaction Insight's **DemoData** directory on the machine where Automator is installed.

The files used in this tutorial have names that start with "Tutorial_5010_850" and contain a purchase order with three PO1 loops. Each has at least one error.

Open one of them and look at the ISA:

```
ISA*00*          *00*          *16*HILLSDALEMARKET*01*TOPCATMFG     …
```

We need to set up this sender and this receiver before sending their data into Transaction Insight.

Set up an Administrative User for the Tutorial

Users are those who log in to Transaction Insight. You will need to create a user with administrative privileges.

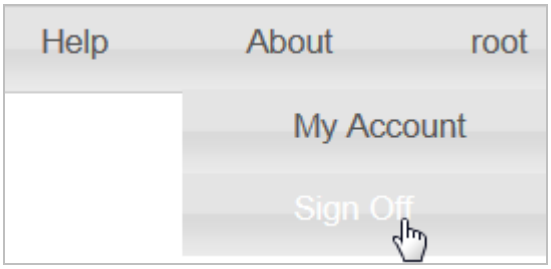
Log in as **root** or another user with administrative privileges.

1. Choose **Common Administration** if TIBCO Foresight Portal Platform (FPP) appears.
2. Click **Admin |Users** on the menu at the top left.
3. Click **Add New User** at the bottom.
4. Fill out the fields:

   User Name TutorialAdmin

   Email TutorialAdmin

   Password *Type a password and confirm*
5. Click **Save**.
6. Under **Available Roles**, select **Administrators** and click the **>** button.
   This user will have access to all administrative pages.
7. Under **Un-Assigned Partner Groups**, select **All Partners** and click the **>** button.
   This user will be able to see data for all partners.
8. Click **Save and Add New**.
9. To check the permissions that go along with Administrators, click **Roles** on the **Admin** menu, click **Administrators**, and be sure that all permissions are selected.
10. Click your username and **Sign Off** at the top right.



11. Log in as TutorialAdmin. The password is case-sensitive.
12. Go to Common Administration.

Tutorial Partners

Partners are those who send or receive data. Senders and receivers should be set up as partners before Transaction Insight processes their data.

Transaction Insight recognizes the partner by one or more unique values in the EDI file.

We will set up these partners:

- The **sender** of the tutorial data (Hillsdale Market).

  Assume that their data always has HILLSDALEMARKET in the ISA06. We will tell Transaction Insight to use that to identify data from Hillsdale.

- The **receiver** of the tutorial data (TopCat Manufacturing).

  Assume that data sent to them always has TOPCATMFG in the ISA08. We will have Transaction Insight use that to identify data sent to TopCat Manufacturing.

Setting up Hillsdale Market

In Common Administration, define Hillsdale:

1. Click **Admin |Partners | Add New Partner**.
2. Fill in the information:

   Partner Name Hillsdale Market

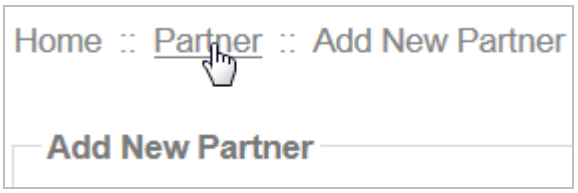
   Identifier `HM`

   Description Boutique in Hillsdale, NJ

   Leave Partner Type as **External**, since this partner is not the Transaction Insight host.
3. Click **Save** and notice the confirming message above the partner name.

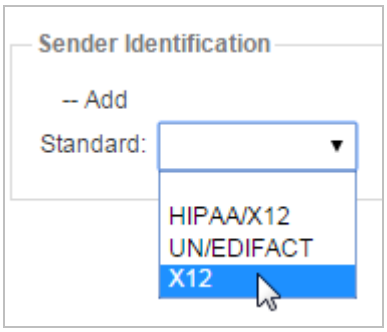
Specify what values in the EDI will identify data as belonging to Hillsdale:

1. Click **Partner** on the top menu (the "breadcrumbs").



2. Click the **SENDERS** tab.
3. Click **Add New Sender Data**.

4. Use the dropdown to select X12 as the base standard that will be used with this partner.



5. Under **Partner**, select **Hillsdale Market**.

6. Type **HILLSDALEMARKET** in capital letters for the ISA06. Do not add trailing blanks, even though they will appear in the EDI.

7. Save and notice the new row for Hillsdale Market.

   Whenever incoming data contains HILLSDALEMARKET in the ISA06, Transaction Insight will assume that it is from the Hillsdale Market partner.

8. On the Receivers tab, click **Add New Receiver Data**.

9. Set up Hillsdale Market data to be identified by HILLSDALEMARKET in the ISA08 and then save.

Define TopCat:

1. Click **Partners | Add New Partner**.
2. Fill in the information:

   Partner Name TopCat Manufacturing

   Identifier TM

   Description Payer and Transaction Insight Host

   Partner Type Internal.
3. Click **Save** and notice the confirming message at the top.

Specify what values in the EDI will identify data as belonging to TopCat:

1. Click **Partner** on the breadcrumbs.
2. Click the **SENDERS** tab.
3. Click **Add New Sender Data**.
4. Use the dropdown menu to select X12 as the type of standard that will be used with this partner.
5. At the top, select TopCat Manufacturing.
6. Type **TOPCATMFG** in capital letters for the ISA06.
7. Save.

   Whenever incoming data contains TOPCATMFG in the ISA06, Transaction Insight will assume that it is for the TopCat Manufacturing.
8. Now use the breadcrumbs to return to **Partners** and then go to the **RECEIVERS** tab.
9. Set up TopCat's incoming data to be identified by TOPCATMFG in the ISA08, and then save.

For more information, see Partners on page 40.

Tutorial Users

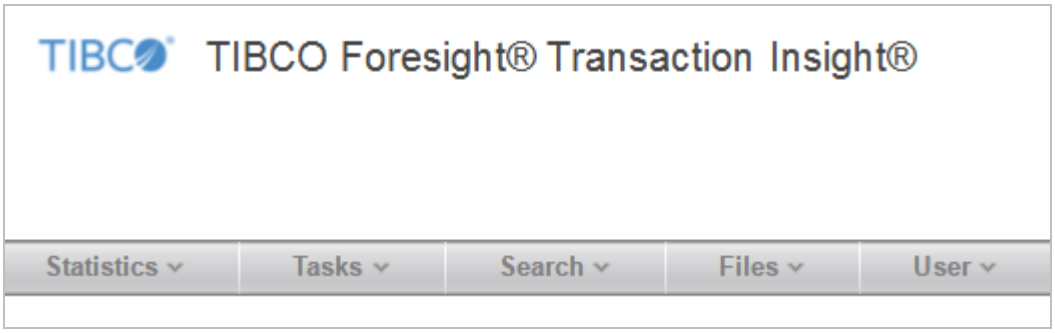
Users are people who can log in to Transaction Insight. We are ready to set up users from Hillsdale Market.

Before setting up their usernames, we want to set up the following for them:

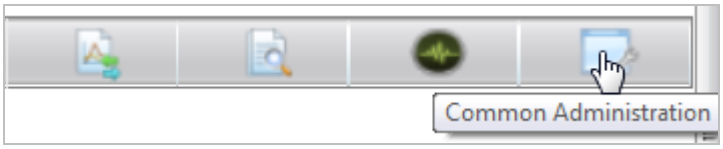
What?	This is called a …	See …
What pages can they see and what can they do on them?	role	below
What data can they see on those pages?	partner group	page 9

Setting up a Role for Hillsdale Users

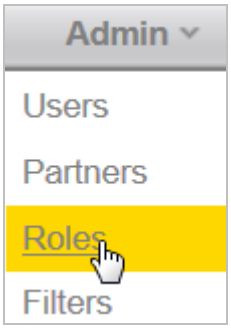
Before setting up users from Hillsdale, we will define which pages they can see on the user menu. We want them to see all pages under Transaction Insight:



1. Click the Common Administration button on the upper right.



2. **Admin | Roles** on the left menu.



3. Click **Add new row ...** .

4. Type **Typical User** and click **Save**.

5. Select all permissions under:

   Archive Action
   Archive Admin
   Archive User
   Files
   OpMon User
   Search
   Statistics
   Tasks

6. Type **100** for Form View Level and Form Edit Level.

   Users with this role will have access to all fields on forms for Hillsdale. (For details, see Controlling a User's Access to Form, Paged Form, and Errors Not in Form Fields on page 154.)

7. Click **Save Changes** at the bottom.

Setting up a Group of Partners for Hillsdale Users

Set up a group for users who can see Hillsdale Market's data:

1. Click **Admin | Partners** on the top menu and choose the **PARTNER GROUPS** tab.

2. Click **Add New Partner Group**, name the group **Hillsdale Group**, and click **Save**.

3. In the Un-Assigned Partners list, select **Hillsdale Market** and click > to move it to Assigned Partners. It is automatically saved.

   This role lets them see all data identified as to or from the Hillsdale partner.

For more information, see Partner Groups on page 46.

Setting up Hillsdale Users

Assume that three people will be logging into Transaction Insight from Hillsdale:

- Florence MacDermand
- Justin Wilson
- Ann Wright

To set them up:

1. Click **Admin | Users** on the top menu.
2. Click **Add New User**.
3. Enter this information:

   User Name `Florence MacDermand`
   Email `fmacdermand@hillsdale.com`
   Password *type a password and confirm*

4. Click **Save**.
5. From Available Roles, select **Typical User** and click > to assign it to Florence.
6. From Un-Assigned Partner Groups, give the **Hillsdale Group** to Florence.
7. Click **Save and Add New**. Look for the confirming message.
8. Add Justin Wilson and Ann Wright in the same way.

When finished, return to the main Users page and confirm that the three users are listed. To find them, you may have to click another page number at the bottom right of the list.

For more information, see Users on page 52.

Tutorial Teams

A team is a set of users who can use the **My Tasks** pages to view and act on erroneous data.

So that our three Hillsdale users can correct errors and resubmit the EDI, we will make a team for them.

Create a Team and Select an Owner and Members

1. Click **Admin | Teams** on the top menu.
2. Click **Add New Team**.
3. Enter this information:

   Team Name Hillsdale Market Team 1
   Team Description Financial Administrators at Hillsdale Markets

4. Under Team Owner, choose **Ann Wright** and click **Next**.

   Ann will get the e-mails when a team receives erroneous data.

5. Under Team Members, choose Ann, Florence, and Justin as Users in Team.
6. Also add **TutorialAdmin** so that you can see their team's tasks when logged it as TutorialAdmin.
7. Click **Next**.

What can Team Members do?

Some will fix data. Others will distribute tasks to team members.

This calls for two roles:

1. Under **Team Roles**, choose **Add new row …** .
2. Type `Task Distributor` and click **Save**.
3. Click the Edit pencil for Task Distributor.

   At the bottom, choose the first five options, and click **Save changes** at the bottom.

   Click **Save** next to Task Distributor.

4. Click **Add new row …** again and add a role called **Data Fixer**.

   Save and Edit this role and select:

Change Status to Closed
Assign Task
Edit Document
Unlock Document
Submit Document
EDI View
View Confidential Claims
Validate Document
Externally Correctable

Type **100** for Form View Level and Form Edit Level (so they can see and edit data in all form fields).

5. Click **Save Changes**, **Save**, and **Next**.

Which Team Members are Assigned to which Role?

Set up team roles assignment now:

1. Click **Task Distributor** and give Ann and TutorialAdmin this role.
2. Click **Data Fixer** and give everyone this role.
3. Click **Next**.

What Data comes to this Team?

Set up a *routing rule* that selects data for this team:

1. Click **Add new routing rule** and fill in this information:

Routing Rule Name	Bad Hillsdale and TopCat Manufacturing data
Transaction Set	`All`
Direction	`All`
Version	`All`
Standard	`All`
Error Type	`All`
Error Number	`All`
Show Data for Internal Partners	`TopCat Manufacturing`
Show Data for External Partners	`Hillsdale Market`

2. Click **Save Routing Rule**.
3. Click **Next** and **Finish**.

Future data coming in from Hillsdale to TopCat will be assigned to this team if the data has errors. Team members will use the **My Tasks** pages to handle these tasks. At the moment, there is nothing to see for this team under My Tasks.

For more information, see Teams on page 64.

Changing the Workflow

Warning
This section assumes that you are using a small test database. You should consult with your Transaction Insight database manager or TIBCO Foresight before changing the workflow on production systems.

Summary statistics are those on the Documents, Document Volumes, and Success Rate pages.

To make the workflow run faster, your demo's workflow updates summary statistics and tasks infrequently. While practicing, you will want to see results much faster than that.

We are going to modify the workflow so that TIUtilities updates summary statistics and tasks every 30 seconds. When ready to go into production, you can set it back.

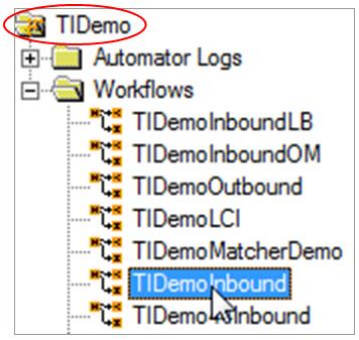
TIBCO Foresight® Studio® users

When possible, workflows should be modified from within Foresight® Studio®:

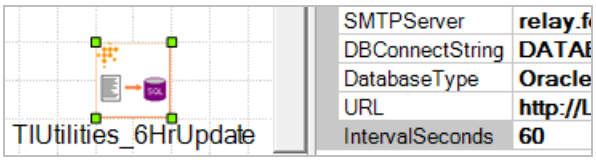
1. Open **Foresight Studio**.

2. Open the Transaction Insight environment's system, and its *environmentname*Inbound workflow.

   In this example, the environment is TIDemo:



3. Click **TIUtilities_6HrUpdate** and change its IntervalSeconds to **60**.



   Change these to True:

   Update Summary Tables
   Summarize Documents

Summarize Errors
Summarize Transmissions
Generate Partner Filters

4. Save.

5. If Automator is running this workflow, stop and restart it.

Other users

The instructions below are for those who do not have Foresight Studio on the machine containing the workflow.

1. From File Explorer, go to **Foresight\Systems***environment***Workflows\1.0***environmentname***Inbound**.

   Back up TIUtilities_6HrUpdate.xml.

2. Edit **TIUtilities_6HrUpdate.xml** with Notepad or an XML editor.

   Search for **IntervalSeconds** and change the value line to a shorter number of seconds, such as:

   <Value>60</Value>

3. Save and close the file.

4. If Automator is running this workflow, stop and restart it.

   Automator only loads the XML files when it starts.

Each 60 seconds, TIUtilities will start updating the statistics at the top of the Documents, Document Volumes, and Success Rate pages.

Importing Data

Set up partner automation:

1. Go to TIBCO Foresight® Instream®'s **Bin** directory and edit **$dir.ini**.

2. Add a line like this to the [UserTables] section, using the correct path to TI_demo.csv:

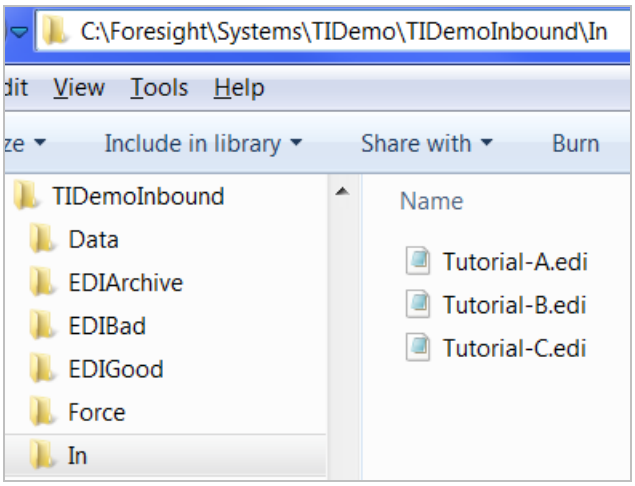
   PARTNERAUTOMATION="C:\Foresight\Instream\Bin\TI500INT.csv"

Send the three tutorial files into Transaction Insight:

1. Go to **TransactionInsight's** *version***DemoData** and copy the three **Tutorial_5010_850*.edi** files.

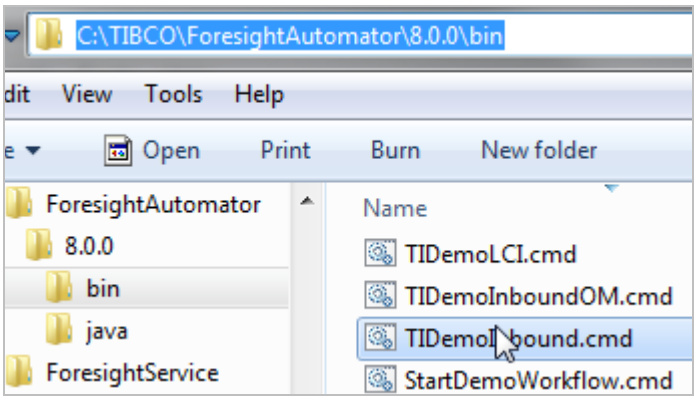
2. Paste them in the **In** folder of your inbound workflow under Systems. Create the In directory if it doesn't exist.

   If your environment is TIDemo, this might be:



3. If Automator is not running the workflow, start it.

   If your environment is TIDemo, you can do so by executing this file:



You can also do it by opening the workflow in Foresight Studio and clicking the toolbar button.

Viewing Transmissions

To see the three tutorial files:

1. Wait a few minutes until Importer and TIUtilities have run.

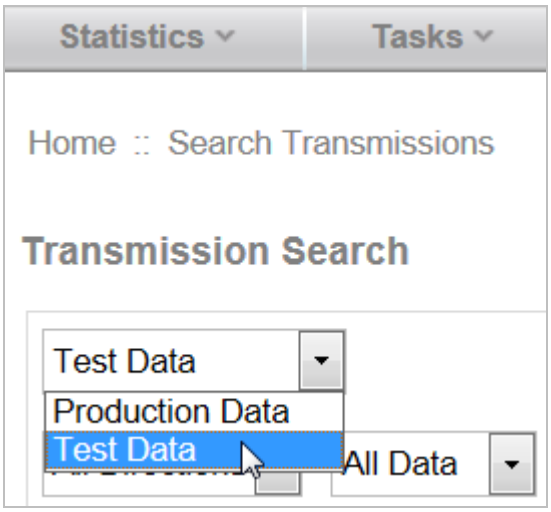
   If you have an Automator window, the Last Task column will show a task for Importer and TIUtilities_6HrUpdate – indicating they have run – and their Status columns show a pink Idle, indicating that they ran successfully.

   You can then shut off the workflow by closing the window - assuming it isn't currently running anything.

2. Return to the portal and choose **Transaction Insight** at the upper right.

3. Click **Search | Transmissions** on Transaction Insight's top menu.

4. At the top left, choose **Test Data**:

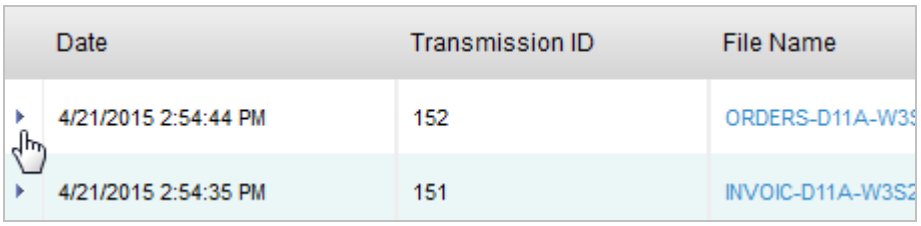


5. Set the **Start Time** to an hour ago, and leave the other filters alone.

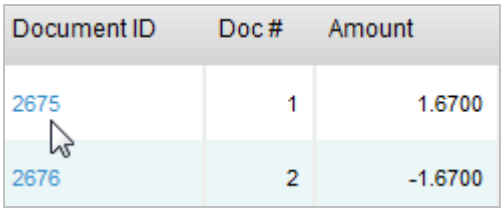
6. At the bottom left, click **Search**.

7. To see information about an entire file, click its filename:

   To see information about documents within a file, click the arrow in its column 1:



   And then click **Document ID**:



   No Data? If the document has not appeared after a few minutes:
   Check the log file under …
   Systems*environment*\Workflows\1.0*environmentname*Inbound\Logs.
   Search for HVInStream and check it's return code (RC:100 means success).
   Search for Importer and check its return code (RC:0 means success).

Note: If healthcare-related data does not appear as expected, it's possible that **Settings | General Settings |Product Mode** is set incorrectly. For more information, see General Settings on page 77.

7. On the Document Summary page, open a form by choosing **Click here to View the document** at the bottom of the page.

   On the form, find a field with a red background, meaning it has an error. Rest your cursor on the circled X to see the error message.

With appropriate permissions, you can view and correct forms through **My Tasks**.

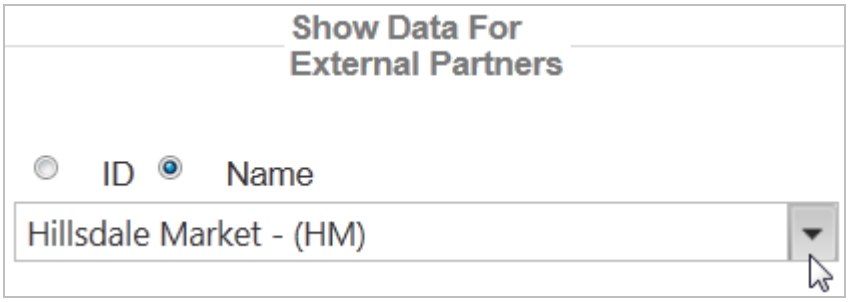
Viewing Top Errors

1. Click **Statistics | Errors** on the top menu to view the list of most common errors for the data selected by the filters.

2. Confirm that **Test Data** is chosen at the top left.

3. Display filters if they are not showing. To do this, click on **Expand** at the far right:

4. To look at the top errors for Hillsdale, select the external partner **Hillsdale Market**:



5. Click **Search**.

6. Click the top error in the **Error Code** column. This is the most common error for Hillsdale Market.

   At the bottom, you will see a list of the Hillsdale documents that contain that error.

   A single file can contain many documents, and each document will be on a separate line.

   If the errors do not have correct descriptions, run the correct TI_ErrorUpdate_For_Instream* script in Instream®'s **Scripts\TI** directory against the Transaction Insight database and then click **Search** again.

7. To view this error in one of these claims, click its number in the **Document ID** column.

8. Use **Click here to View the document** to see the error in a form.

Viewing Statistics

1. Click **Statistics | Documents** on the top menu and confirm that **Test Data** is selected.

2. Click **View Results**.

3. Under Partner Rankings, click **X12 5010 850 Inbound**.

   You will see the number of test data documents handled by Transaction Insight for the dates shown.

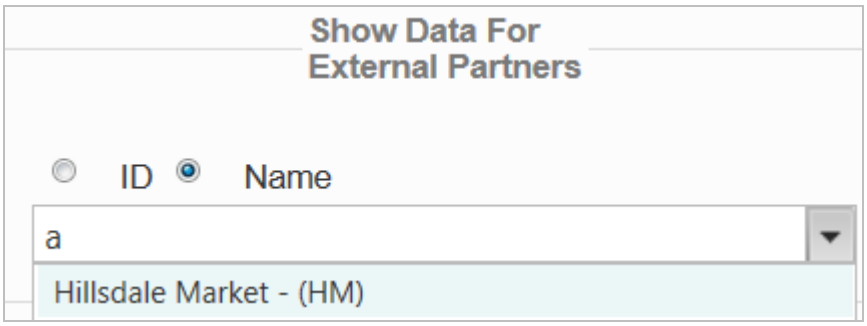
4. Click **Expand** at the far right to show the filters if they are not showing, and then confirm that **Hillsdale Market** is still selected under External Partners.

   The graph and table show document volumes for that partner only.

5. To the right of the graph, change the start and end date to cover the last 7 days and then select the **Day** button and click **View Results**.

   The graph and chart show document volumes for Hillsdale for seven days.

6. Now, select **All Partners** under External Partners. To do so, you may need to replace the contents of the top filter line with an **a**.



Click **View Results**.

The graph and table update to show document volumes for all partners.

7. Click **Hillsdale Market** in the Partners column:

8. Click the **X12 5010 850 Inbound** transaction type in the Partner Rankings column to see a list of partners submitting that transaction type.

The partners are ranked by document volume, with the partner with the highest volume at the top.

9. Click **Statistics | Document Volumes** on the top menu.

This is like the Documents page, with the addition of the **Kind** column that gives good, bad, and total numbers. The Documents page gives only total numbers.

Viewing Success Rate

1. Click **Statistics | Success Rate** on the top menu.

   This page operates like the Documents page, but shows percentage of correct documents for each transaction type.

2. Confirm that **Test Data** and **All Partners** are selected.

3. Click on an entry in the **Partner Rankings** column to see a list of partners who have submitted that transaction type. The partners are ranked by success rate.

Viewing and Fixing Errors

We set up a Hillsdale team to handle errors. We will now see how they will do this.

1. Under Transaction Insight, click **Tasks | My Tasks** on the top menu.

2. At the top right, select **Hillsdale Market Team 1** under Team.

3. Confirm that **Test Data** is selected and that the filters at the top are set to **All**.

   Thanks to the routing rule we set up when defining this team, each erroneous "document" (claim) that has Hillsdale Market as a sender and TopCat Manufacturing as a receiver will appear here as a task, like these:

	Date	Transmission	ST #	Document	Sender	Receiver
☐	1/18/2013	Tutorial_5010_850_C_3sets.edi	3	T20130502-4	Hillsdale Market	TopCat Manufacturing
☐	1/18/2013	Tutorial_5010_850_C_3sets.edi	3	T20130502-5	Hillsdale Market	TopCat Manufacturing
☐	1/18/2013	Tutorial_5010_850_C_3sets.edi	3	T20130502-6	Hillsdale Market	TopCat Manufacturing

No Tasks?

If tasks have not appeared by now:

a. Go to Common Administration:

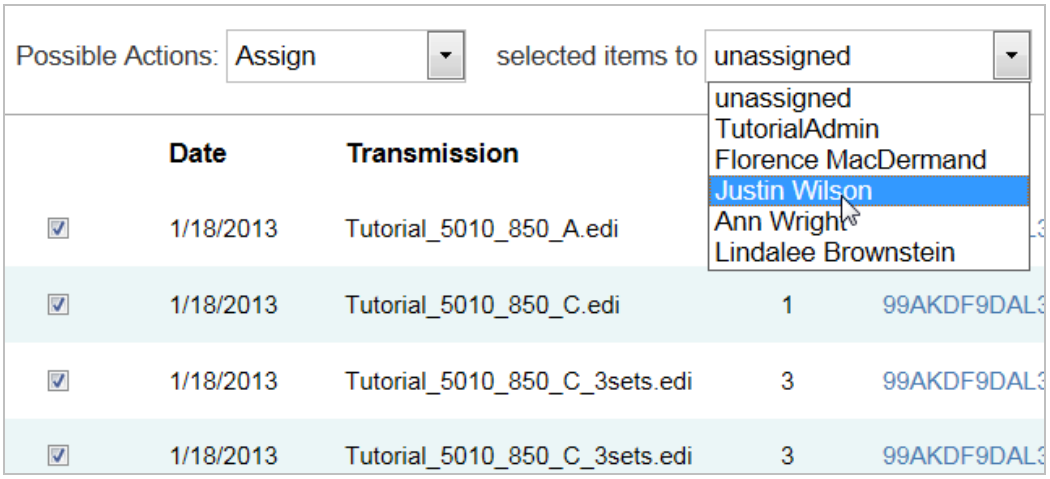
b. Click **Admin | Settings** on the top menu.

c. On the **EVENT LOG** tab, look at the dates, times, and description for an event related to tasks.

d. Click on it and look at the information at the bottom.

4. Back in **My Tasks**, assign the top four documents to Justin by clicking the checkboxes in front of them.

   Under Possible Actions, choose Assign and assign selected items to **Justin Wilson**.



   Click the **Assign** button and look at the **Assigned To** column.

5. For **Tutorial_5010_850_A.edi**, click on the link in the **Document** column.

   Notice the two errors.

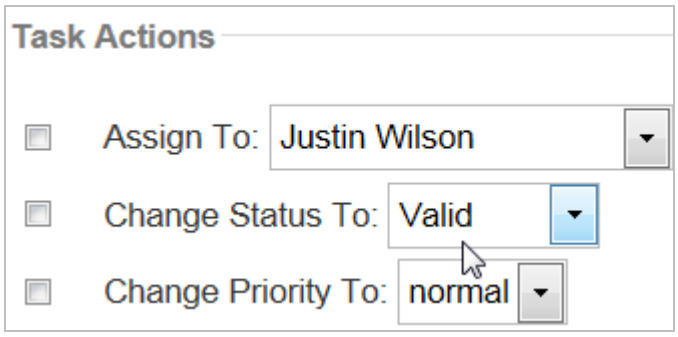
   Click **Edit the Document**.

6. Look for the errors (in red) on the **Errors Not In Form** tab.

7. Float your cursor over the red X for each error to see the message.

   Correct the values and click **Save**.

8. Click **Validate**. After a moment, see if **Change Status To** is **Valid**:



9. If so, the document is now correct. Click **Submit**.

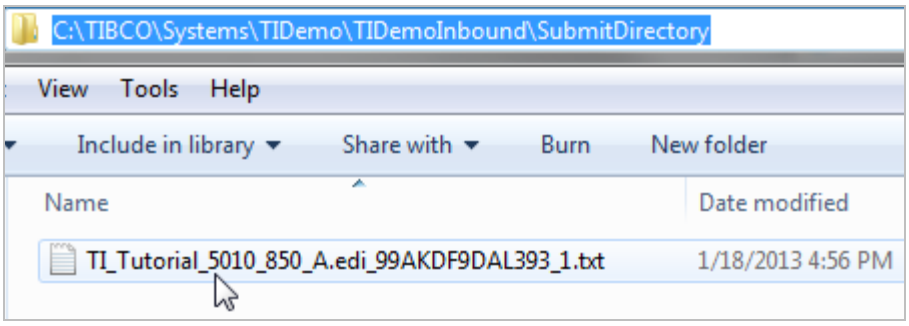
   This creates an external EDI file that can be used by another application.

10. After a few seconds, refresh the page and see if **Change Status To** is **Submitted**.

    If so, you have created an external file containing the corrected EDI data. The submitted file goes to the directory identified by **SubmitDirectory** in the Transaction Insight environment's **Web.config** file.

    Example:

    <add key="SubmitDirectory" value="C:\TIBCO64\Systems\TIDemo\TIDemoInbound\SubmitDirectory\" />



You are able to do all of this because you are logged in as a user with administrative privileges and access to all partners, and are on the Hillsdale Team.

Your users will be limited to the privileges and partner data that you set up for them. To see Transaction Insight from their point of view, log off (in upper right corner) and log in as Ann Wright or another of the users that you created at the beginning of this tutorial.

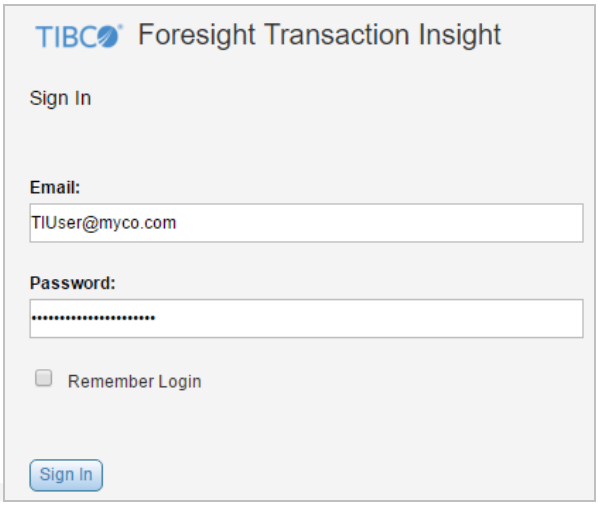
Remember to log in with their e-mail address, not their name:

3 Basics

Logging in

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

Type the Email and Password and click **Sign In**.



For a brand new installation, you can logon as root.

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

Remember Login saves your Email and Password. If you do not click Logoff, the next time you start your browser and access the portal, you will skip the Account Login page. If you do not want the Remember Login option to appear, please search for **Remember Login** in **TIB_transactioninsight_*version*_installation.pdf**.

For details on how login information is defined, see **Setting up New Users** on page 52.

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

Using the TIBCO Foresight Portal Platform

If you have access to more than one portal application, you will see the TIBCO Foresight Portal Platform (FPP) when you log in.

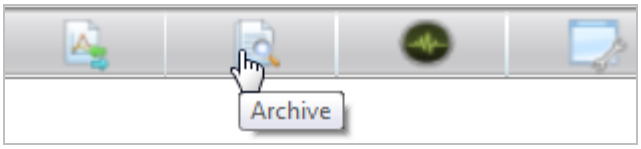
It will contain two or more of these applications.

Application	Purpose	For details, see …
Transaction Insight	Statistics, Tasks, Search, Files, and User pages	**TIB_transactioninsight_*version*_usersguide.pdf**
Foresight® Archive and Retrieval System	Archives and retrieves data	**TIB_fsp_archive_*version* _archiveuser.pdf**
Foresight® Operational Monitor	Monitors system activities	**TIB_operationalmonitor_*version*_usersguide.pdf**
Common Administration	Administrative pages for Transaction Insight, Foresight Archive and Retrieval System, and Foresight Operational Monitor	**TIB_transactioninsight_*version* _commonadministration.pdf**

If TIUtilities has not been run against the database since installing or upgrading, all applications may appear on the portal. After TIUtilities runs, only licensed applications will appear.

Click the icon for the application that you want to use.

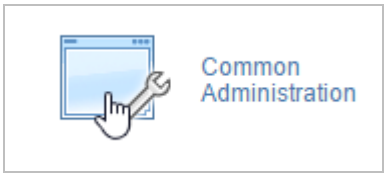
Once in an application, you can move between applications with the icons at the upper right:



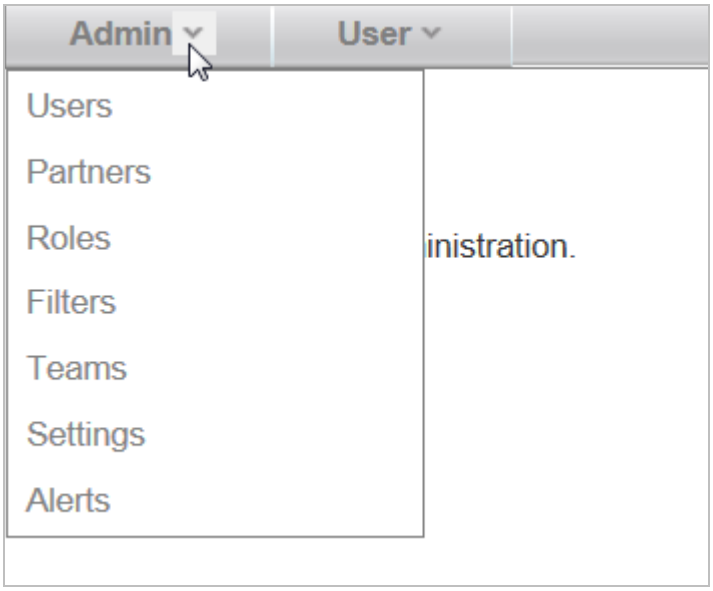
If you have access to only one application, you skip the portal and go directly to that application.

Entering Common Administration

If you logged into an account with administrative privileges, FPP will offer a Common Administration link, along with any other links to which you have access.



Click **Common Administration** to see the administrative menu for all portal applications:



Creating an Administrative User

Right after installation, log in to root.

- Create at least one administrative user for yourself and other administrators (see Setting up New Users on page 52) and assign it the **All Partners** group and the **Administrative** role.
- Log in as that user when you perform administrative duties.
- Change root's password from the default.

Password Changing, Expiration and Deactivation

Changing your own password

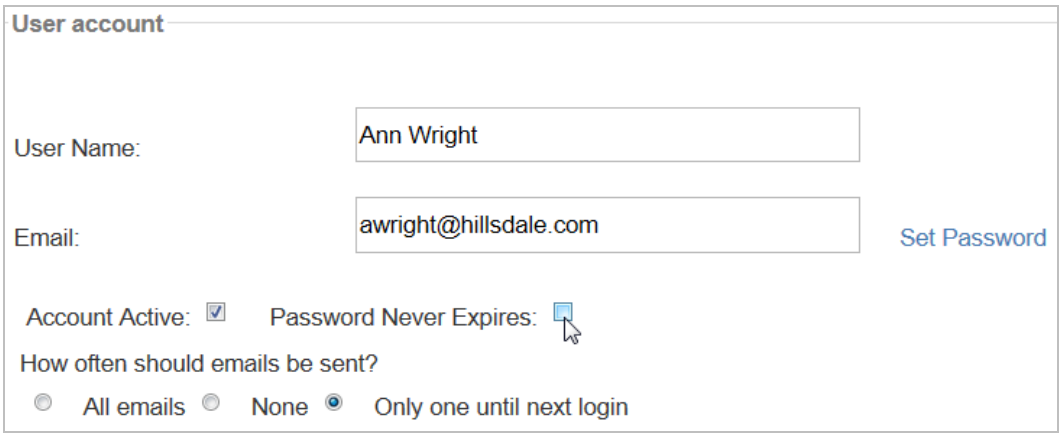
Each application has a **My Account** page where users can change their own passwords.

Changing another user's password

An administrator can update passwords in Common Administration:

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

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



   The expiration interval is configurable under **Admin | Settings | General Settings**. See Expiration and password minimum complexity on page 29.

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

Deactivation

A username is deactivated if:

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

An administrator can reactivate the user by:

1. Clicking **Users**.
2. Editing the user.

3. Selecting **Account Active**.

4. Entering a password (if they don't remember it).

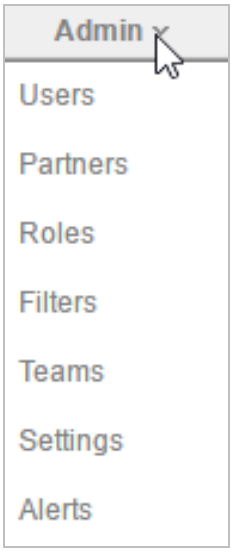
5. Saving changes.

Expiration and password minimum complexity

You can set up requirements for password expiration and complexity under **Admin | Settings | General Settings**.

Administrative Pages

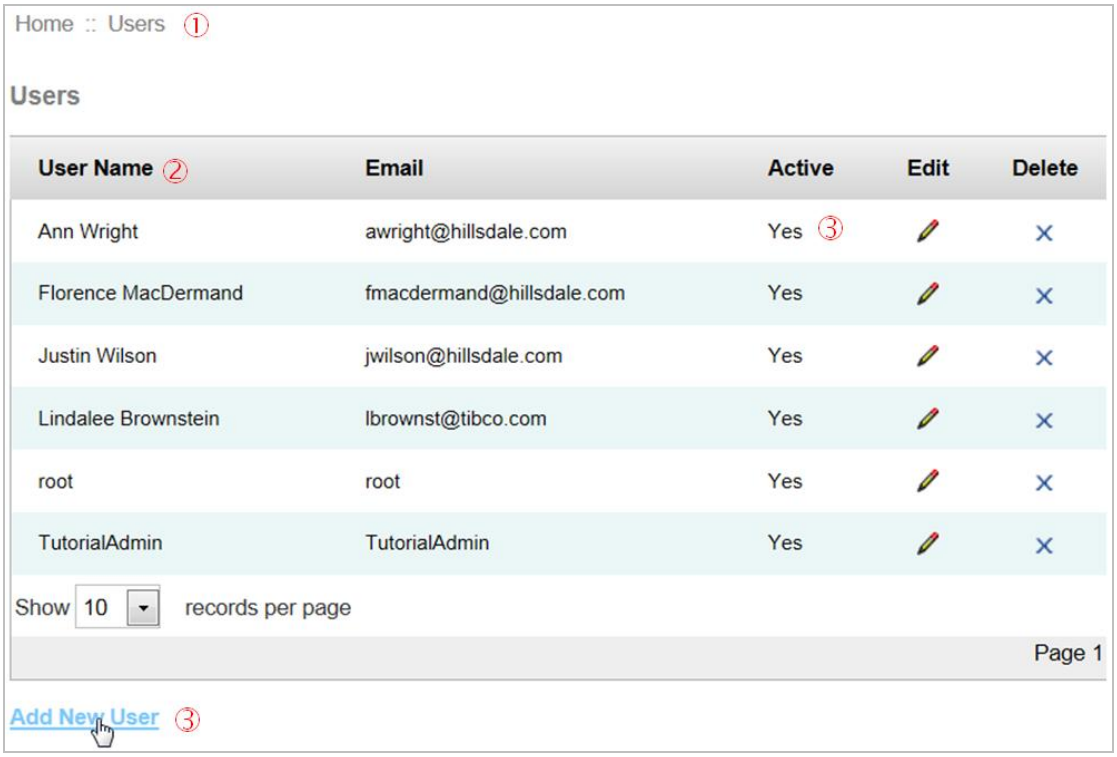
Administrative functions are on these pages under Common Administration:



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

Navigating

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



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

② You can sort on some columns by clicking on their headings.

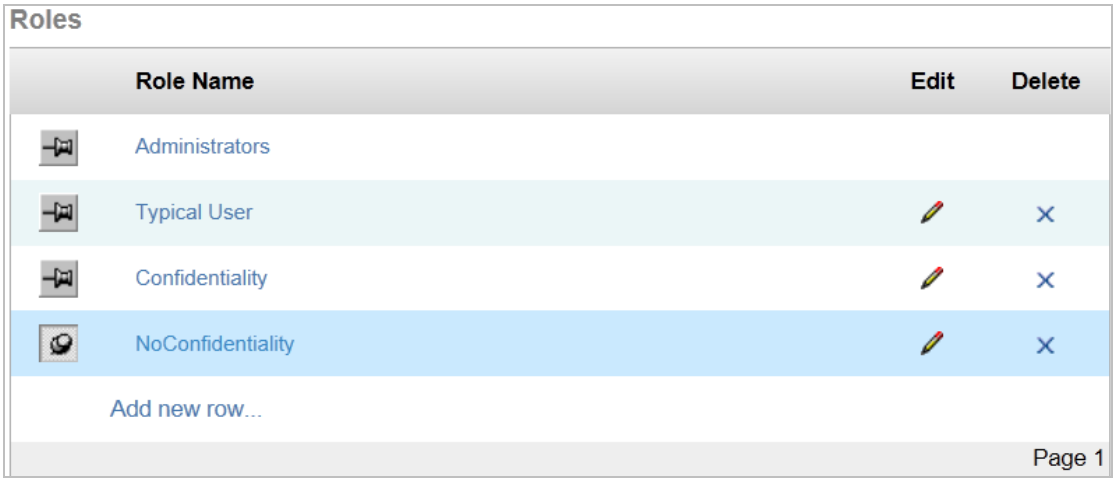
③ Links vary by page. Links for adding new items are always at the bottom left

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

Some pages have:

Pushpins Edit an item's subordinates.

Edit pencils Edit an item's name and subordinates.

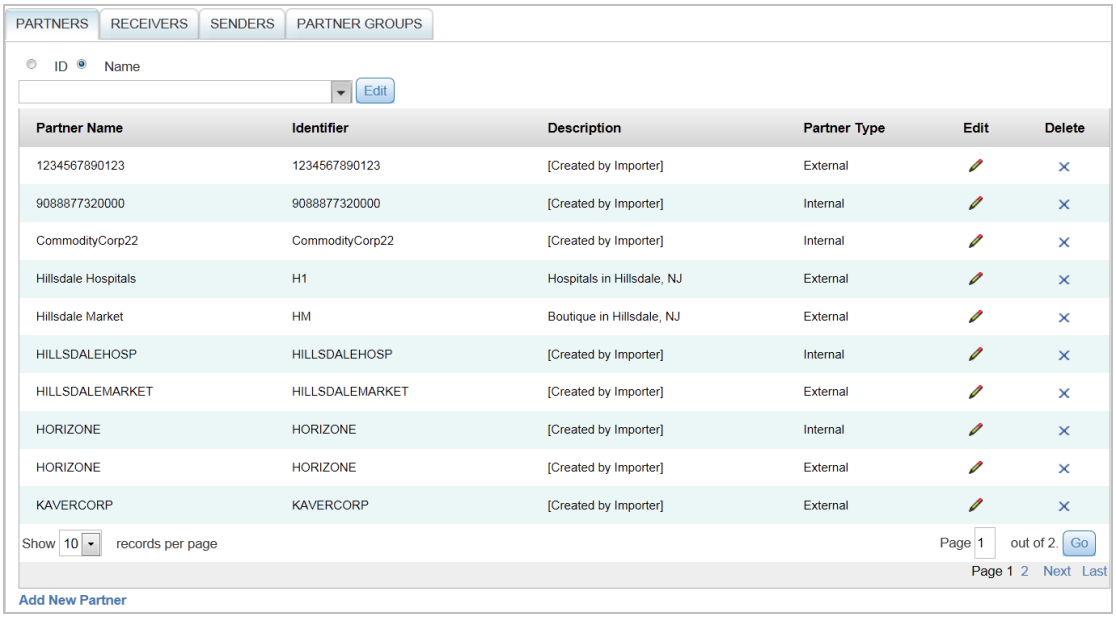


Click the **Admin | Partners** menu to see the page shown below.

Some pages have:

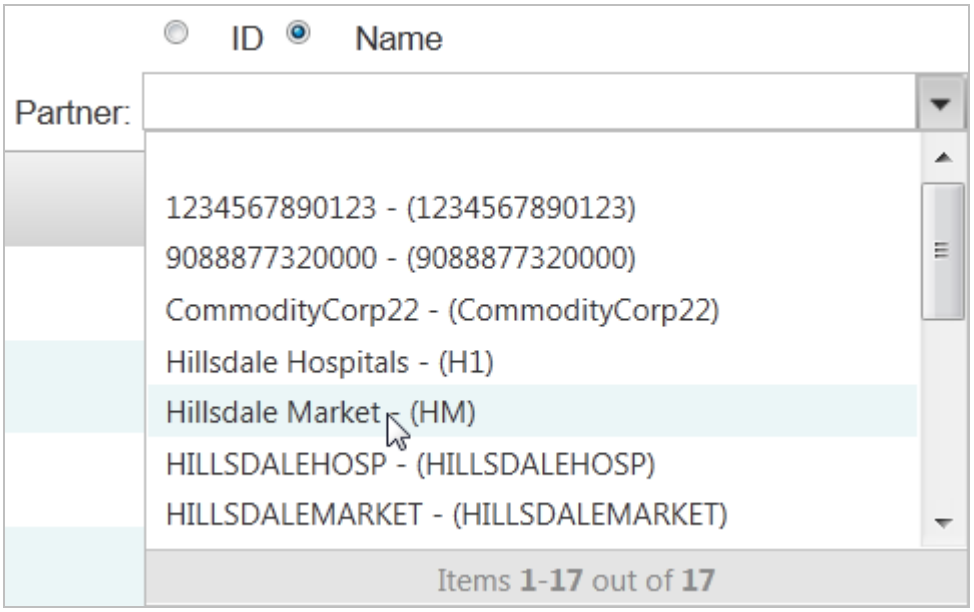
Tabs Selected tabs are always colored differently than the others. This example has four tabs, and we are currently looking at the Partners tab.

Page numbers Page numbers at the bottom right let you see more items.



Selecting from a List

Transaction Insight has many drop-down lists like this one:



Because these can contain a large number of selections, it is a "find-me" control. To find a selection that is not showing:

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

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

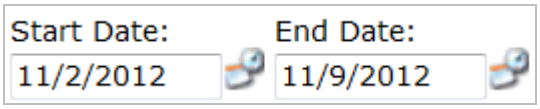
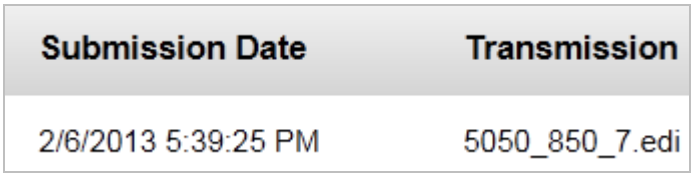
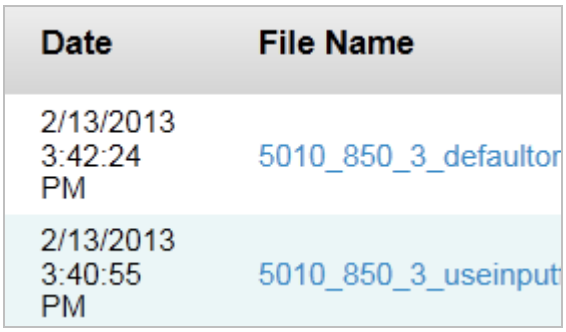
Dates and Times

Two types of dates appear in Transaction Insight:

- The date when Instream validated the data – see Validation Dates on page 33.
- A date from the EDI data itself – see Dates from EDI Data on page 34.

Validation Dates

Most dates in Transaction Insight are validation dates. Examples:

Next to graph on Statistics pages	
Errors page (after clicking on an error number)	
Transmissions pages	

Dates from EDI Data

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

The EDI element that contains the document date varies by transaction. See Appendix G of **TIB_transactioninsight_version_usersguide.pdf**.

Document Summary Page

You will see two dates for that document:

Transmission Name: 5010_850_3_defaultoriginalfile.edi
Transmission Date: 2/13/2013 3:42 PM
Standard: X12
Version: 5010
Transaction Set: 850
Document Date: 3/28/2012 12:00 AM
Sender: Hillsdale Market
Receiver: TopCat Manufacturing
Dollar Amount: $0.00

Transmission Summary Page

The Document Date is from the EDI data itself:

Transmission ID: 67
File Size (bytes): 16322
File Path: C:\TIBCO\Systems\TIDemo\Workflows\1.0\
File GUID: dc8aae91-761d-11e2-93b8-b5c6eb0265cc
Direction: Inbound

Submission Date: 2/13/2013 3:42:24 PM
Completion Date: 2/13/2013 3:42:24 PM

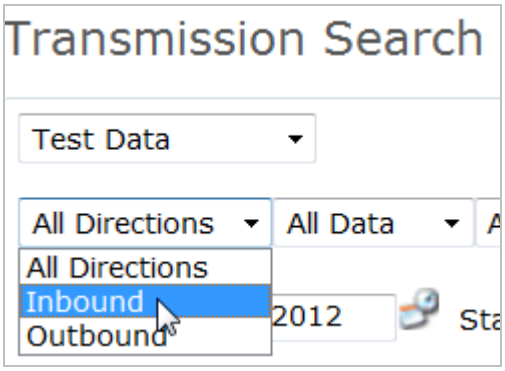
The Original File Date is text passed to Transaction Insight with the validation command line parameter **–m** or with useinputfileasoriginal=1 in Importer.ini.

See **TIB_fsp-instream_*version*_usersguide.pdf**.

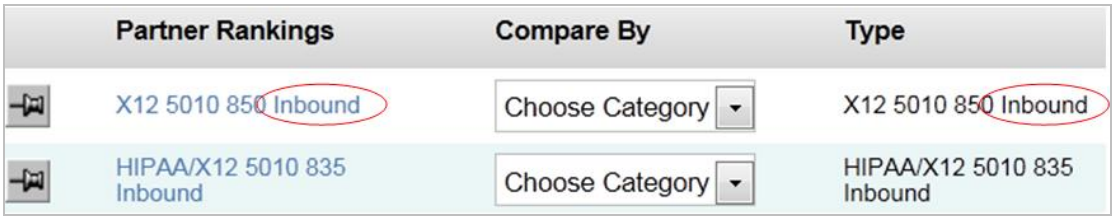
Inbound and Outbound Documents

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

Example: Transmissions Search



Example: Documents page



Inbound and Outbound are from the point of view of the Transaction Insight host:

Inbound Data sent *to* the Transaction Insight host's organization.
Outbound Data sent *from* the Transaction Insight host's organization.

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

It is determined by:

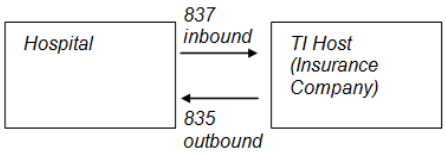
- Importer's command-line parameters **i** and **o**. See **Importer.pdf**.
- In an Automator workflow, the **Direction** property in the Importer component.

Examples of inbound and outbound data:

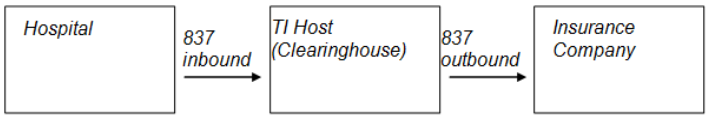
- If the Transaction Insight host is an insurance company, 837 data that it receives is inbound data. 835 data it sends to providers is outbound data.
- If the Transaction Insight host is a clearinghouse, 837 data that it receives from providers is inbound even though the receiver ID may be an insurance company. The clearinghouse then repackages the 837 and sends it on to an insurance company. This transmission of the 837 is now outbound from the point of view of the clearinghouse.

Examples of inbound and outbound data:

- If the Transaction Insight host is an insurance company, 837 data that it receives is inbound data. 835 data it sends to providers is outbound data.



- If the Transaction Insight host is a clearinghouse, 837 data that it receives from providers is inbound even though the receiver ID may be an insurance company. The clearinghouse then repackages the 837 and sends it on to an insurance company. This transmission of the 837 is now outbound from the point of view of the clearinghouse.



E-mails

Transaction Insight sends e-mails to users who:

- Have a valid e-mail address set up under Users (see Setting up New Users on page 52).
- Have e-mail frequency set to **All emails** or **Only one until next login**.
  (Only one until next login means only one of each type listed in the table.)

Circumstance	Sent to …	Configuration	Sent by …
Task arrives for team	Team owner	TIUtilities with these parameters: -from -smtp -url Content of e-mail is specified under **Settings | Messages | New bad document**	TIUtilities with the -t parameter. See **TIUtilities.pdf**.
Task is assigned to team member on My Tasks page	Team member receiving task	Content of e-mail is specified under **Settings | Messages | Task assignment** SmtpServer and FromAddress in Web.config	The Transaction Insight web interface
Alert is triggered	Users identified at bottom of Alerts page All members of teams identified at the bottom of the Alerts page	FromAddress in AlertProcessor.exe. config Schedule and content of e-mail is specified at the bottom of the Alerts page Schedule also depends on how often you run AlertProcessor	AlertProcessor.exe

4 Administrator Pages

List of Administrative Pages

Your activities as an administrator include setting up and maintaining:

Partners (See page 40)

Partner Groups (See page 46)

Roles (See page 51)

Users (See page 52)

Filters (See page 55)

Teams (See page 64)

Settings (See page 74)

Alerts (See page 99)

My Account (See page 106)

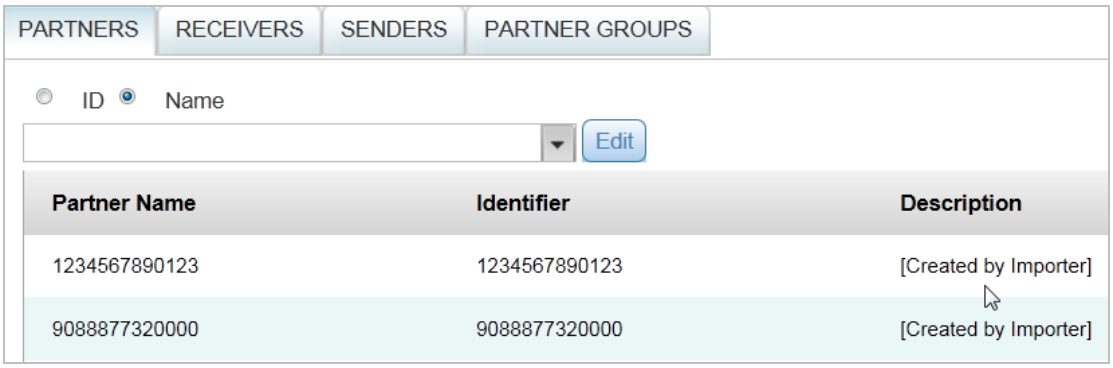
DRG Setup (See page 106)

Partners

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

Before importing data for a partner, you can define both the sending and receiving partners on the Partners page in Common Administration. This includes information on the Senders and Receivers tabs.

If data from an unknown partner is imported, Importer creates a partner and uses the interchange sender and receiver for its sender and receiver routes. If you notice a partner with a description of [Created by Importer], check the values on the RECEIVERS and SENDERS tab for that partner.



Please see Partner Assignment Error Causes on page 125 for details on how to troubleshoot partner problems.

Internal and External Partners

Internal partners are divisions of the Transaction Insight host.

- If the host is a payer, these are its divisions or departments.
- If the host is a provider, an example may be its billing department or accounting department.
- If the host is a clearinghouse, these may be the various parts of the clearinghouse service.

External partners are those who exchange EDI with the Transaction Insight host.

- If the host is a payer, this may be providers, other payers, or clearinghouses.
- If the host is a provider, this may be payers or clearinghouses.
- If the host is a clearinghouse, this may be payers, providers, and other clearinghouses.

What every Partner Needs

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

Specify this …	See page …
Partner name	41
Partner type – internal or external	42
Values that identify data sent TO and/or FROM this partner	44

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

Specify this …	See page …
A partner group that contains this partner	48
Users who have access to that group	46

Setting up a Partner

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

Adding a Partner

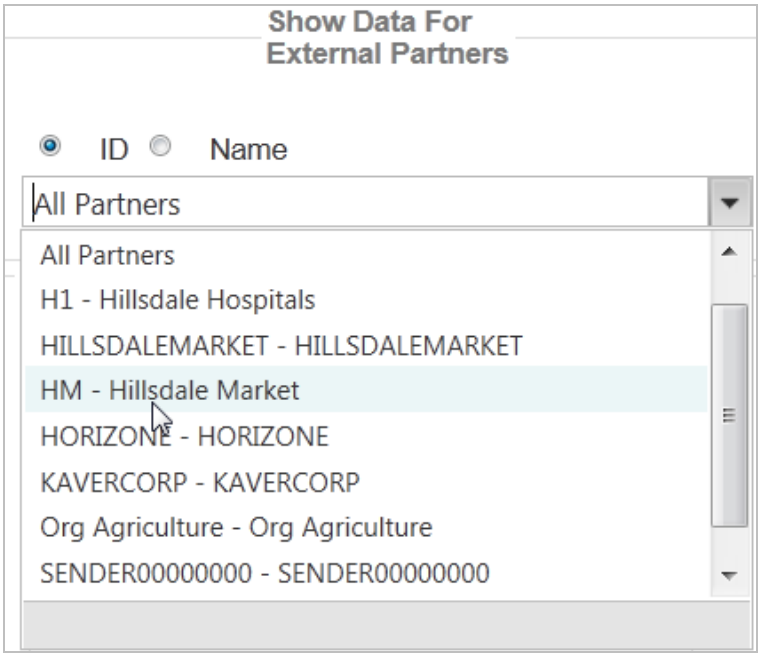
Before adding a partner, know what values will uniquely identify the partner in incoming data and in outgoing data.

To add a partner:

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

   Partner Name This will show up on reports and lists.

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



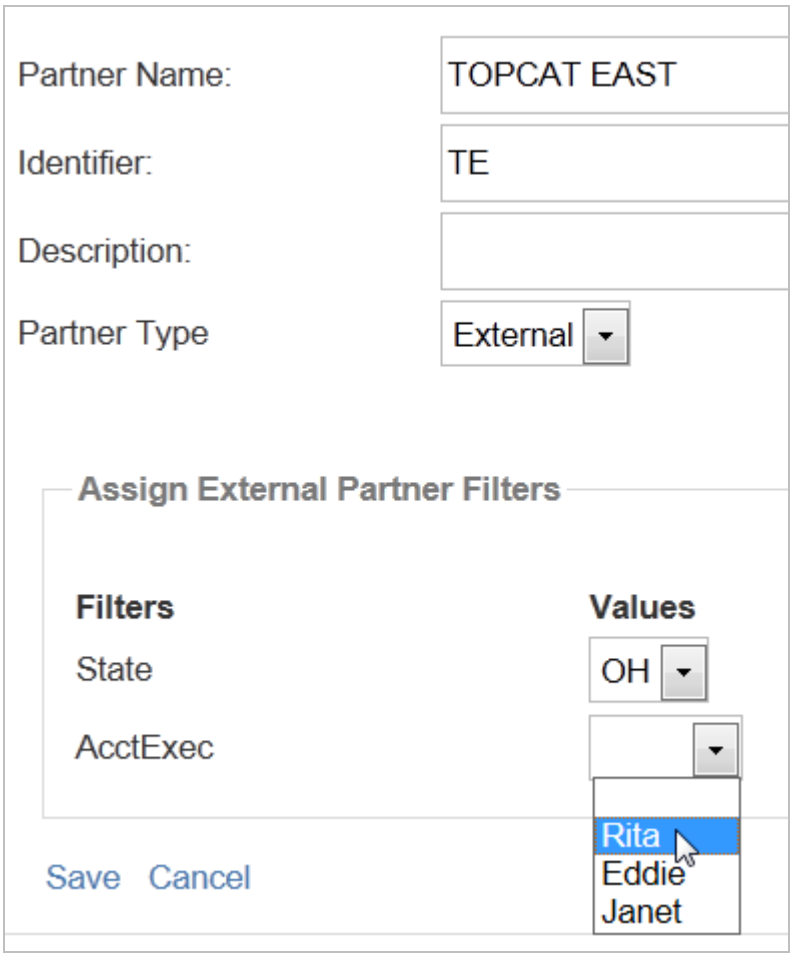
Description Optional; for your use.

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

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

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

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



   Where did filters come from? See Filters on page 55.

6. Notice the list of partner groups that can access this partner's data.

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

Identifying Partner Data

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

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

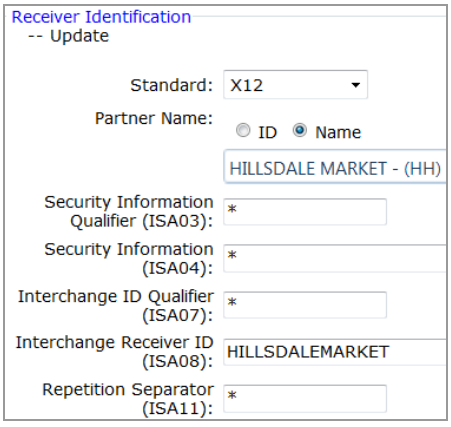
You can do this in two ways:

- By pointing to data inside the transaction set (rather than in the enveloping). This requires guideline changes. See Custom Records Overview on page 117.
- By pointing to certain data in the interchange or group enveloping (ISA05 and ISA06, for example). This is described below.

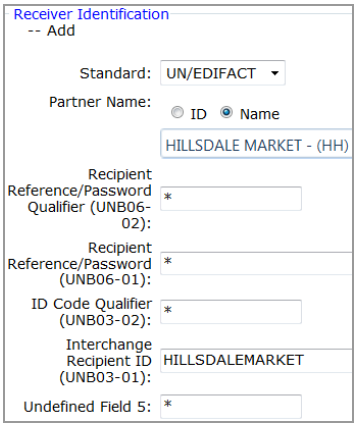
Identifying this Partner as a Receiver of Data

1. On the main **Partners** page, click the **Receivers** tab.
2. Click **Add New Receiver Data**.
3. Pick the standard that the partner will send. If they will send more than one kind, pick one and enter the data, and then create a second receiver for the other kind.
4. Select the partner.
5. Type values that will be in data received by this partner and that will uniquely identify that partner.
   - For data to be identified as belonging to this partner, values that you enter here must ALL be present in the data.
   - Omit trailing blanks, even if they will be included in the data to meet minimum lengths.
   - The values are case-sensitive.
   - A blank for a value means that only a blank value will match.
   - An asterisk means that any value will match.
   - Do not leave asterisks in every field.
   - Be sure t**hat the same combination of values does not belong to any other partner.** If enveloping does not uniquely identify a partner, you can do so with data inside the transaction set or message (rather than in the enveloping). This requires guideline changes. See Custom Records Overview on page 117.
   - EDIFACT has some undefined fields which you should leave with an asterisk.

X12 Example



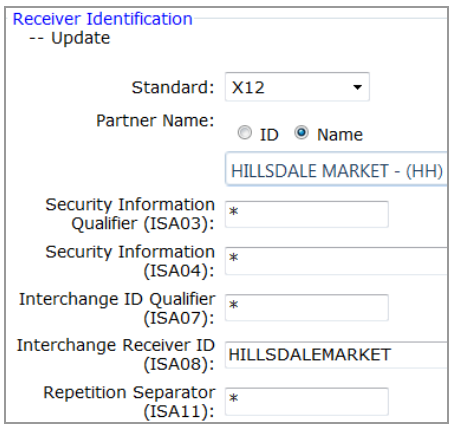
EDIFACT Example

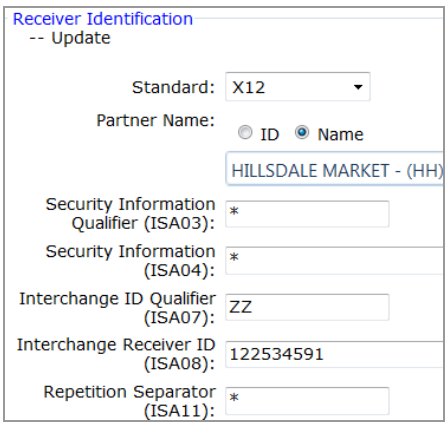


6. Click **Save**.

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

Example: If Hillsdale Market receives data that can have either HILLSDALEMARKET or ZZ in the ISA-07 and 122534591 in the ISA-08, click **Add New Receiver Data** again and set up separate receiver identifications for each:





You may also need to set up different identification for each transaction (271, 277, etc.) that a partner receives.

Identifying this Partner as a Sender of Data

1. On the main Partners page, click the **Senders** tab.
2. Click **Add New Sender Data**.
3. Select the standard.
4. Select the partner.

5. Type values that will identify data sent from this partner.
   Be sure that the same combination of values does not belong to any other partner.

6. Click **Save**.

When Finished Setting Up a new Partner

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

Your next step is to put this partner in a new or existing partner group as described in Partner Groups on page 46.

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

Partner Groups

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

User access	When users log on, they will see statistics and data for the partners in partner groups to which they have access.
Filters	An administrator can set up a Partner Group filter. See Setting up Group Filters on page 62.

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

Partner Group Example

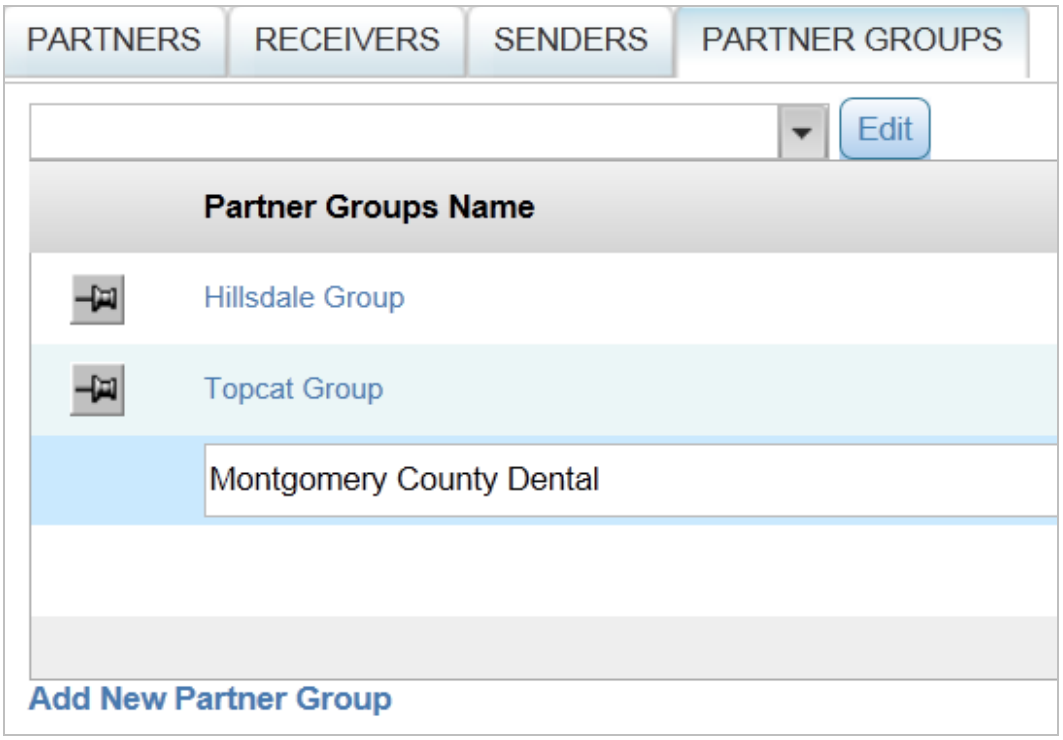
You could set up a Montgomery County Dental group that includes several related dental practices. You can assign this group to users who should be able to see data for any or all of these practices, but no other partner's data. You might assign this group to:

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

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

Creating a Partner Group

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



5. Finish defining the partner group by:

Choosing Partners for a Partner Group page 48

Giving Users access to a Partner Group page 48

Setting up Folders for a Partner Group page 48

Choosing Partners for a Partner Group

To specify which partners are in a partner group:

1. From the **Partners** | **Partner Groups** tab, edit the group by clicking its name. You may have to use the page numbers at the bottom right to find it.
2. At the bottom, choose the **Assign Partners** tab.
3. Under **Unassigned partners**, select one or more partners that users with this group can see.
4. Click > to copy selected partners to the Assigned Partners box.

Giving Users access to a Partner Group

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

1. From the **Partners** | **Partner Groups** tab, edit the group by clicking its name. You may have to use the page numbers at the bottom right to find it.
2. At the bottom, choose the **Users** tab.
3. In the left box, select the users.
4. Under Available Users, use > to copy selected users to the Assigned User(s) box.
5. Click **Save Changes**.

Setting up Folders for a Partner Group

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

To set up folders for a partner group:

1. From the **Partners** | **Partner Groups** tab, edit the group by clicking its name. You may have to use the page numbers at the bottom right to find it.
2. At the bottom, choose the **Folders** tab.
3. Click **Add New Folder**.
4. Type a name for this location.
5. Type a local path on the web server. Create this folder before anyone tries to use it.

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

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

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

8. Click **Save**.

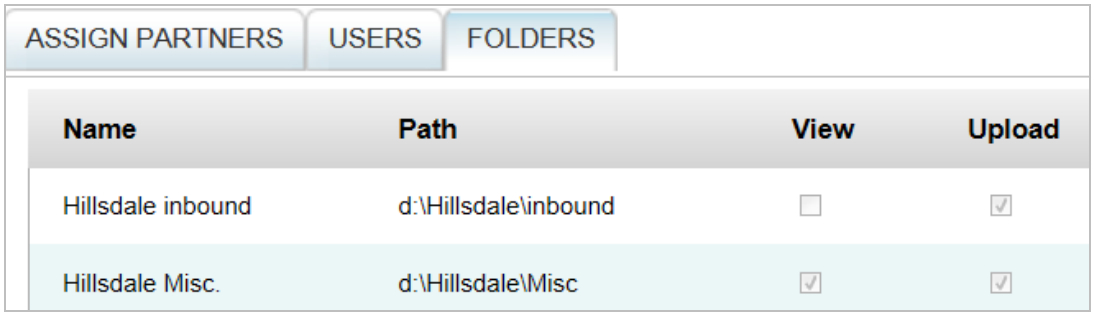
9. Repeat for other folders for the group.

10. The next time a user with access to that partner group logs on, they can use the **Files | Upload** or **Files | View** page.

Example

In the example below, the **Hillsdale Market** group will have these folders:

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



Maintaining a Partner Group

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

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

3. Take one of the following actions.

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

4. Save the changes.

Maintaining Partners

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

To …	Do this …
Delete the partner	Click the **X** in the Delete column. The partner is immediately deleted if it does not have data already assigned to it in Transaction Insight. If it has data, reassign the data to the correct partner (see Moving Data to the Correct Sender or Receiver on page 125) and then return to delete the unwanted partner.
Change the name, description, identifier, partner type (external or internal) or filters	Click the partner's pencil in the Edit column.
Change the identifying data	Click the **Receivers** or **Senders** tab. Click the partner's pencil in the Edit column.
Change its partner group	Click the **Partner Groups** tab.

Errors in Partner Assignment

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

See Partner Assignment Error Causes on page 125 for details on diagnosing and fixing partner assignment errors.

See Moving Data to the Correct Sender or Receiver on page 125 for details on diagnosing and fixing partner assignment errors.

Roles

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

Steps include:

1. Defining a role.
2. Assigning a role to a user.

Defining a Role

1. From the top menu, choose **Admin | Roles | Add new row** … .
2. Type a name for the role and click **Save**.
3. On the **Permissions** tab, select the permissions for users who have this role.

   See User Permissions on page 131.
4. **Save Changes**.

Assigning a Role to a User

1. On the **Roles** page, click the name of the role.
2. Choose the **Users** tab.
3. Choose the users under **Available Users**. Use *Ctrl+click* or *Shift+click* to choose multiple users.
4. Move them to **Assigned Users** by clicking the button.
5. **Save Changes**.

All users get access to My Account. Other permissions have to be set through Roles. Please see Portal Permissions on page 131.

Users

Setting up New Users

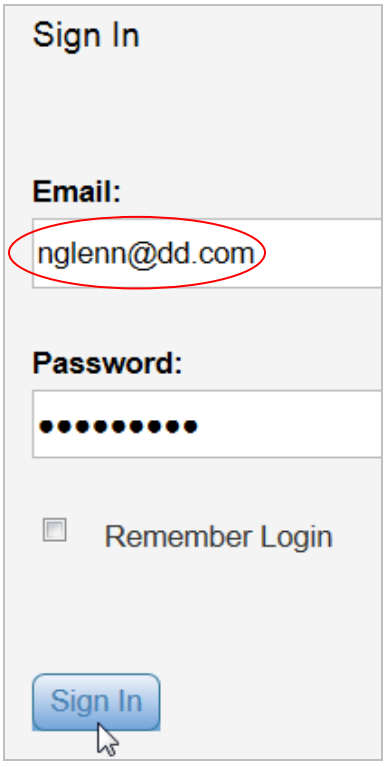
A user is someone who can log in to a portal application.

Adding a User

1. Log in with administrator privileges.
2. Be sure that you have set up a role with the correct permissions for this user (see Roles on page 51).
3. Click **Admin | Users**.
4. Click **Add New User** at the bottom.

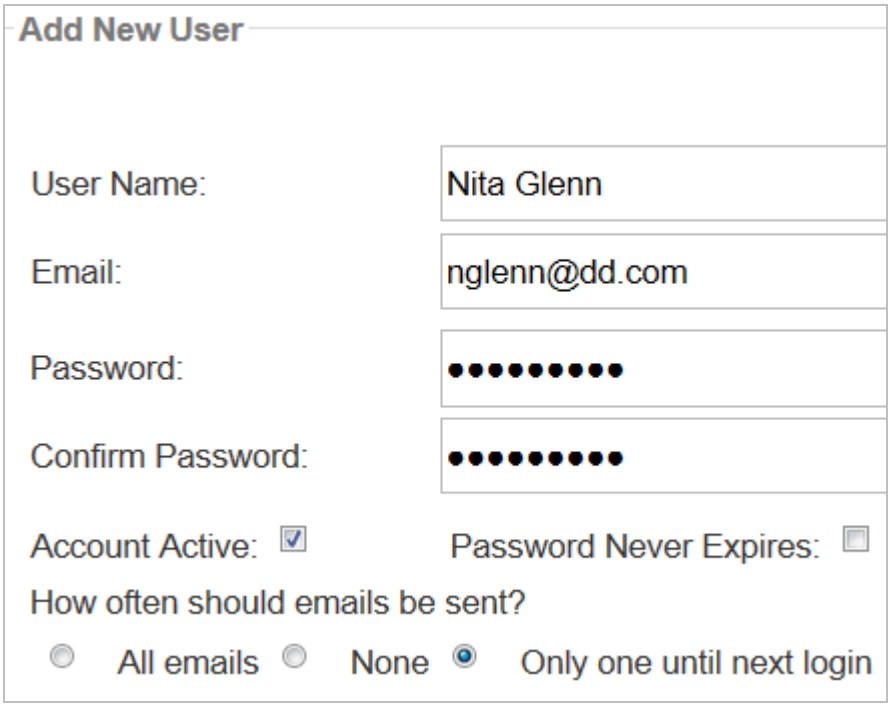
   Fill in the top of the Add New User page:

User Name	How their name is to be displayed within Transaction Insight.
Email	User's e-mail address; used for login (because it is always unique) and displays at the top right when they are logged in.



	The address is also used for e-mail alerts for this user. Please be sure that this a properly formatted and valid e-mail address if this user is to get alerts. If the user will not need e-mail alerts and does not belong to a team, then you need not enter a valid e-mail address and can omit the @-sign. In that case, you may want to use something shorter.
Password	Password of your choice. This is case sensitive.
Confirm Password	Type password again.
Account Active	If selected, the user can log in.

Example:



5. Click **Save**.

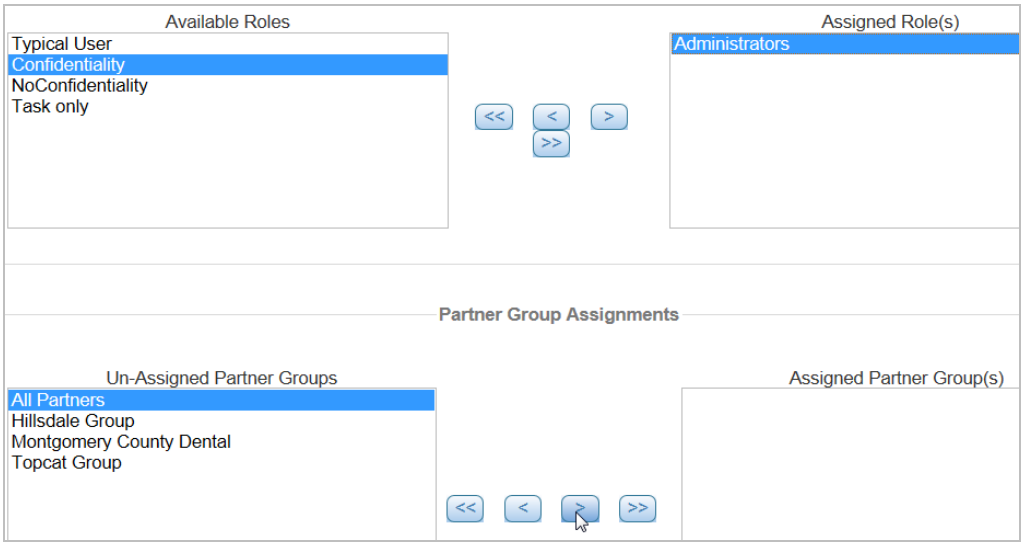
Assigning Roles to a New User

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

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

2. Similarly, if this is a Transaction Insight user, select the partners whose data this user can see.

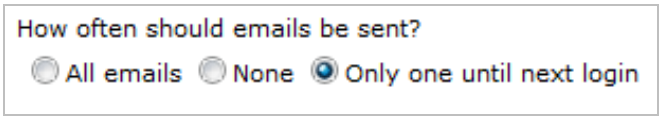
   All Partners is for internal users who will need to see all current and future partners. This is appropriate for internal users like CEOs and Transaction Insight administrators.



3. Click **Save and Add New** and look for the confirmation message at the top of the page.

Setting E-Mail Frequency

On the main Users page, click a user's edit pencil to change the frequency of e-mails sent from Transaction Insight tasks and alerts:



All emails - any triggering event sends an e-mail.

None – user will not receive Transaction Insight emails.

Only one until next login - the user will get a maximum of one e-mail notification for each category of e-mails while logged out. This lets them know that they need to log in and take action. Other e-mails that would have been sent to this user are suppressed. Once they log in and log out again, they can get one more e-mail if another triggering event occurs.

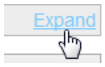
Maintaining Users

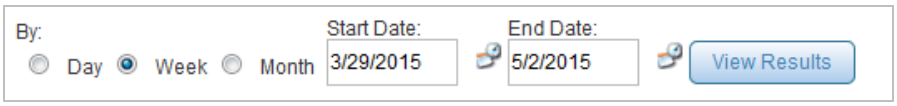
1. Click **Users** on the menu on the left.
2. Locate the user. You may have to click on another page number at the bottom right.
3. Take one of the following actions.

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

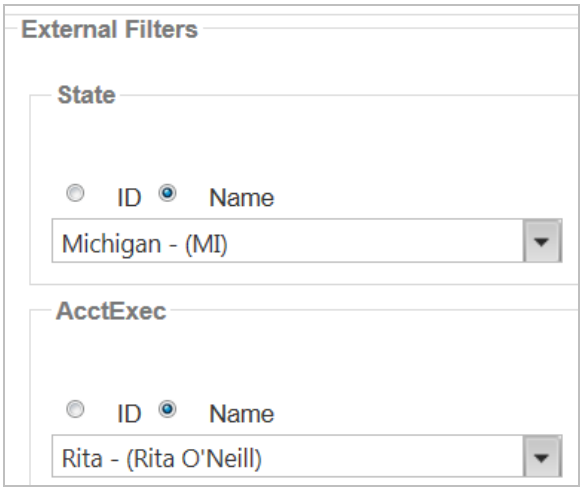
Filters

A filter is a set of values that lets users select documents based on certain attributes of the partners or of values in the data itself. They are available in the middle of Transaction Insight statistics pages when **Expand** has been clicked.



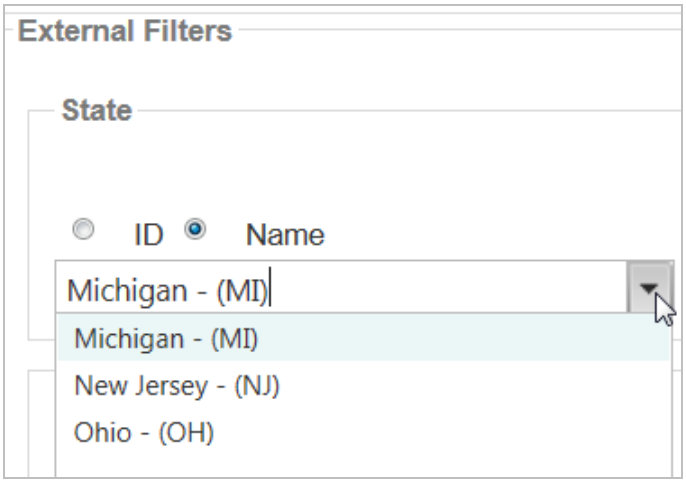


This example has two partner filters:



Setting up Partner Filters

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



Creating a Partner Filter

To set up a partner filter:

1. Log in with administrator privileges.
2. In Common Administration, click **Filters** on the main menu.
3. Confirm that the **Partner Filters** tab is selected.
4. Select a filter type at the top:

   External means the filtering is based on an attribute of an external partner (example: are they a hospital, clinic, manufacturer, retail, supermarket chain?).

   Internal means the filtering is based on an attribute of an internal partner (host billing system, for example).

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

Filter Name	Name to appear above the drop-down lists for filtering reports.
Description	For your own use.

Is FilterID Used	Optional ID that can be used for sorting filter values on statistics pages. These are enabled globally under **Settings | General Settings**. **IMPORTANT:** This field **must** be selected if you have selected the **Is Filter Generated** field, indicating you want to auto-generate partner filter values. Otherwise, duplicate filter values could be created.
Is Filter Generated	If not selected, you type the filter values yourself, and you assign filter values to partners. If selected, Transaction Insight automatically generates the filter values and assigns them to partners based on criteria that you specify. See page 59. **IMPORTANT:** The **Is FilterID Used** field **must** be selected if you have selected this field. Otherwise, duplicate filter values could be created.

7. Click **Save**.

Assigning Values and Partners to a Partner Filter

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

You can do this in two ways:

- You can type the values and then specify which partners have which values. In this case, do not select **Is Filter Generated**.
- Transaction Insight can build the list from EDI data and assign values to partners. In this case, you must select **Is FilterID Used** and **Is Filter Generated**. In this example, Zipcode is going to be added to the filter as the values come in to Transaction Insight. The other two filters have values that are input by the Transaction Insight administrator.

Filter Name	Description	Is FilterID Used	Is Filter Generated
State	2-digit state code	Yes	No
AcctExec	Account Executive	Yes	No
Zipcode	5-digit zip code	Yes	Yes

When the Administrator sets up Values and Partners

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

From the **Filters** page:

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

   Fill in these fields:

Filter Value	Type a value to appear in the drop-down list.
Filter Identifier	Type an ID if you are using them (see **Is FilterID Used** on page 57).
Order	(Optional) Type a number for the order in which the value is to appear in the filter's drop-down list. This is an integer greater than 0. If omitted, they are alphabetized.

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

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

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

1. From the main Filters page, click **Assign to partners** in the filter's Assign column.
2. Under **Assign to**, select a filter value.
3. Under **Available Partners**, select partners who have that value. Use *Ctrl+click* to select multiple partners.
4. Click **Assign** and notice the partners in a field at the bottom.
5. Under **Assign to**, select another filter value and repeat the assignment process.
6. When finished, leave the page. The assignments are automatically saved.

When Transaction Insight generates the Filter Values and Partners

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

Business Example

We want to have Transaction Insight look at the first letter of the submitter ID (ISA06) and assign it to a value in the **Submitter Type** partner filter. If it is an H, assign the filter value Hospital. If it is a C, assign the filter value Clinic, etc. To have Transaction Insight automatically generate these values and partner assignments:

1. Make a guideline with a custom record that snags the first letter of the submitter ID. The custom record name can be ZZTS0 through ZZTS9. See **BusinessRules.pdf**, which is provided with TIBCO Foresight® EDISIM®, Instream, and TIBCO Foresight® HIPAA Validator Desktop®.

2. Validate with that guideline.

3. Set up a partner filter that generates the list of filter values and associated partners (explained below).

From the **Filters** page:

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

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

Field	Meaning
Standard	Which type of standard does this filter involve?
Transaction Set	Which transaction sets will be affected by this filter?
Partner Type	Are the partners to be included senders and/or receivers?
Direction	Is the data inbound or outbound?
Is Active?	Check this box when you are ready to activate the filter.
When a new filter value is found	Initially, select **Create a new filter value** so that Transaction Insight can build the list of filter values and assign partners. At some point, you will notice that you have collected all filter values that you want. Additional values coming in are erroneous or obscure. To lump all future values into a line in the filter called "Other," change this to **Add to "Other" filter value**.

Field	Meaning
Elements	Which EDI element contains the value for the value list? The ones that start with Z are values from custom records (see Custom Records Overview on page 117).
Only Unidentified Partners	Initially, do not select this. Let Transaction Insight check all new partners and assign them to a filter value. Thereafter, select **Only Unidentified Partners** so that doesn't keep re-evaluating partners that it has already considered.
Rebuild	This is a last resort. It deletes all filter values and rebuilds them by checking all transmissions in the database. If you have customized filter value names, these are lost.

3. Save.

When Transaction Insight encounters data from a new partner, it will capture the data and add it as a filter value.

The new filter values are refreshed in the drop-down on the web portal at an interval specified by **Common Admin > Settings > Cache**. Default is every 12 hours (720 minutes).

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

Filter Value	Filter Identifier
Ohio	OH
Michigan	MI
Maryland	MD

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

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

- Have you imported some new data that should have triggered an auto-generate of the filter values?
- Has TIUtilities run to add the entries to the filter?
- Can you see the custom records in the Instream validation DTL file?
- Have you created and merged the necessary guidelines, and used them in Instream validation?

Maintaining Partner Filters

1. Click **Filters** on the menu on the left.

2. Take one of the following actions.

To …	Do this …
Delete the filter.	Click the **X** in the Delete column. The filter is immediately deleted.
Change the filter name, description, FilterID setting, Filter Generated setting, or values.	Click the filter's pencil in the Edit column.
Change the filter's values.	Click the group's pushpin , pencil, or name. Values will show up at the bottom of the page, if there are any. You can edit the values or add new ones.
Add a new filter.	Click **Add new row** below the list of filter names. See Setting up Partner Filters on page 56.

3. Click **Save**.

Setting up Transaction Filters

A transaction filteris a set of values for a transaction set or message. It lets the user select certain documents for inclusion on statistics and search pages. If a document contains a certain value or values at a certain location, it is included.

Transaction filters use guidelines that your organization has customized to flag certain elements and put their contents in Instream validation's detail results file.

For directions on how to create transaction filters, please see **Filters_for_FPP.pdf**.

Maintaining Transaction Filters

1. Choose **Filters | Transaction Filters**.

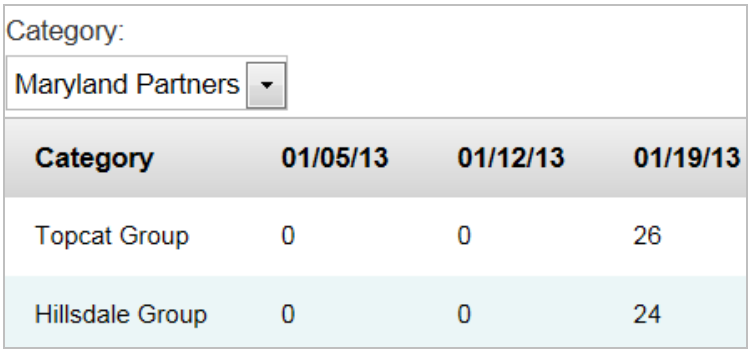
2. Choose the standard and transaction set or message.

3. Make the changes and save. For details about the columns, see Creating the Transaction Filter in **Filters_for_FPP.pdf**.

Setting up Group Filters

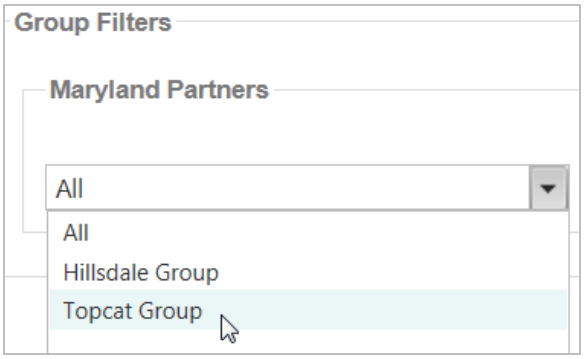
A group filter lets the user select certain partner groups for inclusion in statistics.

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



Category	01/05/13	01/12/13	01/19/13
Topcat Group	0	0	26
Hillsdale Group	0	0	24

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



They offer these capabilities over simply using partner filters:

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

Creating a Group Filter

1. Click **Filters** on the left menu.
2. Select the **Group Filters** tab.
3. Click **Add new row …** at the bottom.

4. Type a name and optional description for this filter.
5. Click **Save**.
6. Select groups for this filter and click > to move them to **Assigned Partner Group(s)**.
7. Click **Save Changes**.

Maintaining Group Filters

1. Click **Filters | Group Filters**.
2. Take one of the following actions.

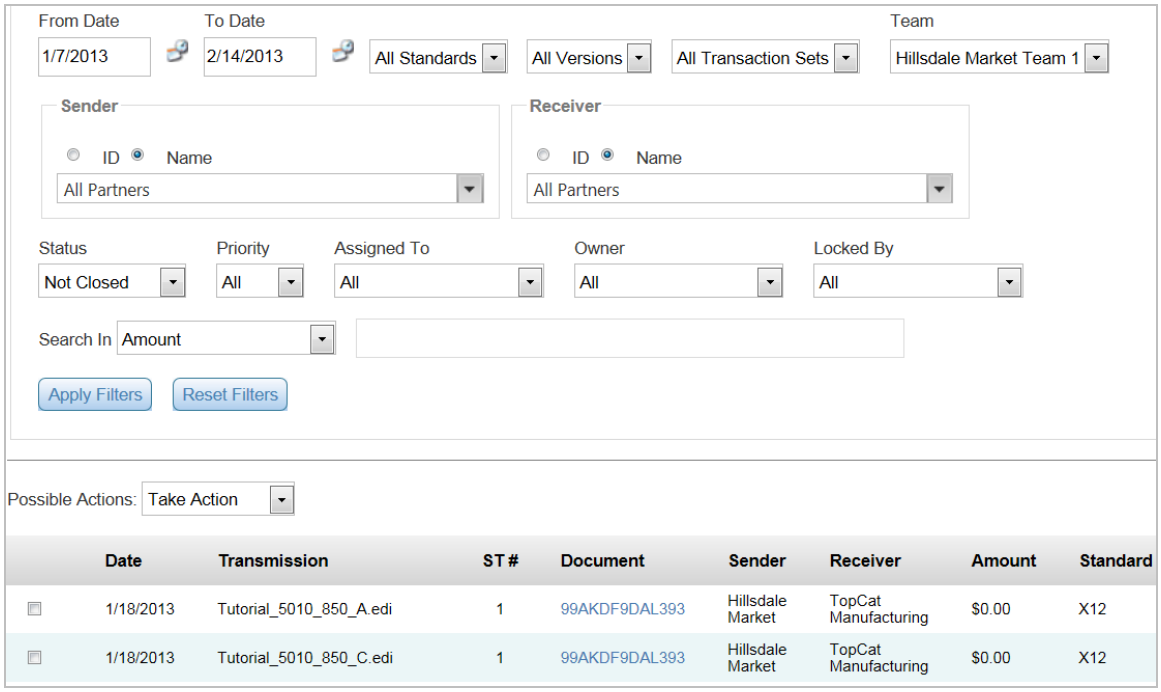
To …	Do this …
Delete the filter.	Click the **X** in the Delete column. The filter is immediately deleted.
Change the filter name, description, or assigned partner groups.	Click the filter's pencil in the Edit column.
Change the filter's assigned partner groups.	Click the group's pushpin , pencil, or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

Teams

What are Teams?

A team is a set of users who handle documents with errors. They can go to My Tasks and pick up a document from a list of erroneous data. For non-EDIFACT data, they can correct and resubmit it, or take other actions such as assigning it to someone else.

This example is the main My Tasks page for Hillsdale Market Team 1. There are documents waiting to be viewed and fixed.



When a team member has taken whatever action is required on these documents, a team member can change the status. An administrator can add other statuses under the Settings menus (see Settings on page 74). Transaction Insight changes the Status under certain circumstances – for example, if the document is corrected and the re-validated.

Under My Tasks, a team member can:

- View the list of application documents (claims, etc.) awaiting action due to errors.
- Filter the view by selecting any of the items at the top.
- Assign one or more documents to someone else on the team.
- Change the status or priority of one or more documents.
- Unlock a locked document.
- View, correct, and resubmit data.

This page is documented further in
TIB_transactioninsight_*version*_usersguide.pdf.

As administrator, you responsibility for the My Tasks page is to set up teams for your users as explained in Setting up New Teams below.

Setting up New Teams

The examples below set up a 3-person team and then specify that their task list is to include:

- All 837I inbound documents with errors
- From Hillsdale Market
- To either TopCat Manufacturing or Horizon West.

Start a new Team and Pick an Owner

1. Click **Admin | Teams | Add New Team** (at the bottom left).

2. Type a unique Team Name and a Description.

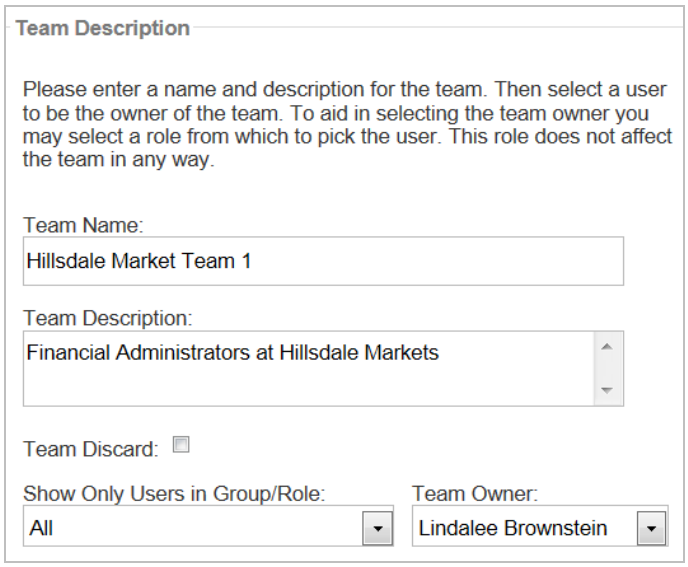
   Skip Team Discard unless you want to make rules for documents that are not to be assigned to any team (see Team Discard on page 72).

3. Pick a **Team Owner**.

   This is the person who is responsible for the team and who will receive e-mails for the team. This happens when Transaction Insight processes a transmission for which this team is responsible, and it contains at least one bad document. The e-mail contents are set up globally under **Settings | Messages**.

   You can make the list under Team Owner shorter by choosing a group under **Show Only Users in Group/Role**.

   This example shows the beginnings of a team that is going to manage errors in files sent from Hillsdale Market.



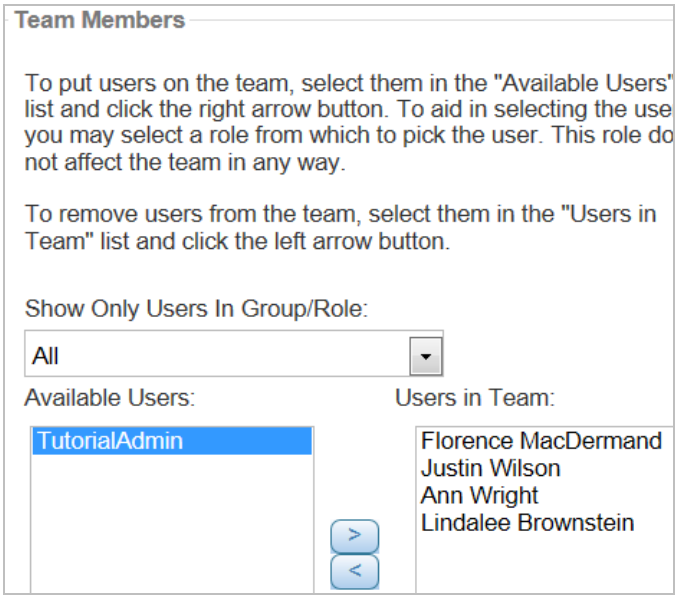
4. Click **Next**.

Pick Team Members

1. If all users are in the same role or partner group, you can filter the list of Available Users with **Show Only Users In Roles and Partner Groups**. This is optional.

2. Use **Ctrl**+*click* to select users for the team. These are the people responsible for handling data errors.

3. Click > to move them to the team. Include the team owner. This team has two members, including owner Nita Glenn:



4. Click **Next**.

Team Roles

Roles give the team members permission to manipulate documents.

You can set up roles:

- For an individual team
- That globally apply to all teams – see Template Roles on page 84.

See Portal Permissions on page 131 for a chart describing where you can change and assign roles.

To set up roles that apply only to this team:

1. See if there is a suitable template role already listed that is not editable (no pencil in the Edit column). These are global roles that apply to all teams.

2. If you still need to add the new role, click **add new row ….**

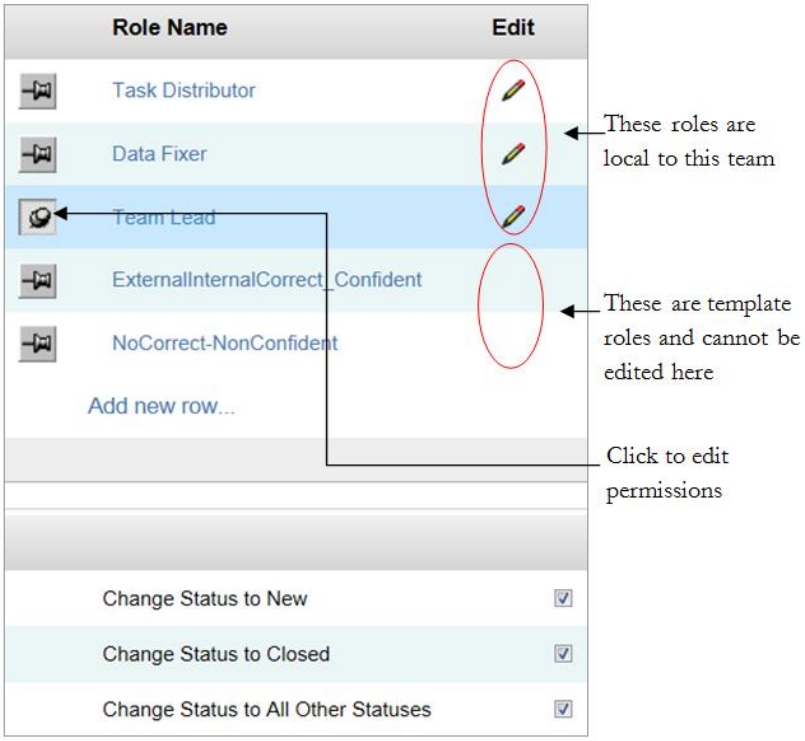
3. Type a name for the new role and click **Save**.

4. Click the pushpin in front of the role and select permissions that this role will have. (See Portal Permissions on page 131 for more details).

   (Names and permissions for template roles that were set up under **Settings | Template Roles** can only be modified there – see Template Roles on page 84).

   This example shows a team with four roles. **Team Lead** is selected (notice its pushed-in pushpin), so its permissions are showing.

   In this example, the last two roles cannot be edited here because they are template roles.



5. Click **Save Changes**.

6. If the team needs additional roles, click **add new row** again.

7. When finished adding roles, click **Next**.

Assign Roles to Team Members

1. Click the pushpin for the first role.

2. Select one or more **Available Team Members** for the role and click > to move them to **Team Members in Role**.

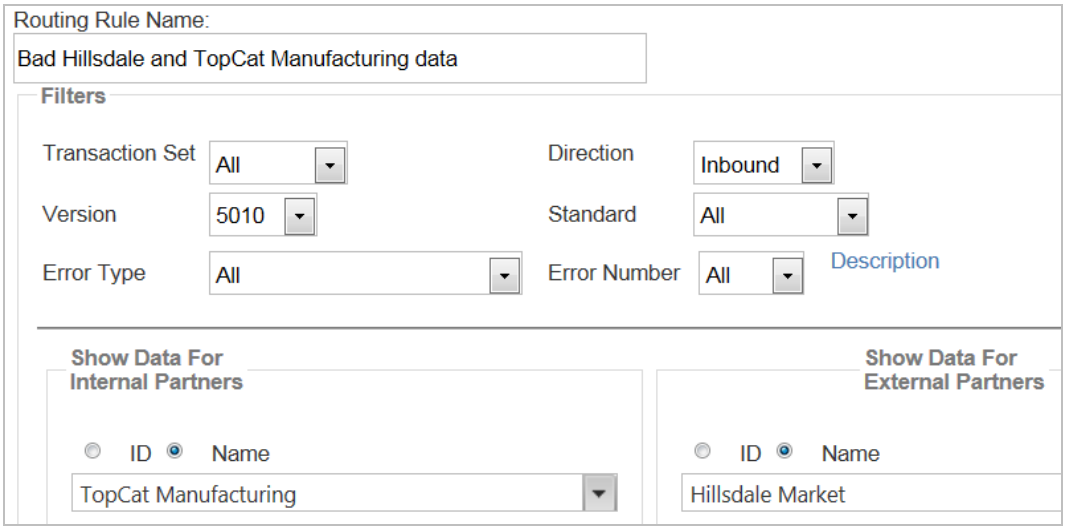
3. Click the pushpin for the next role and select members for it. One member can have multiple roles. Repeat for all roles.

4. When finished assigning roles, click **Next**.

Set up Team Routing Rules

Routing rules let you define which documents are to appear on this team's task list. You can set up routing rules under Alerts as well. (See Cache on page 98.)

The example sets up one rule that selects all 5010 inbound documents from Hillsdale to Topcat:



To set up a routing rule:

1. Click add new routing rule….
2. Type a name for the first rule.
3. Which transactions will be included?

Under **Filters**, select:

Transaction Set	Select a transaction or message, or **All**.
Version	Select a version or **All**.
Error Type	Select a HIPAA type (Transaction Insight Healthcare edition only) or **All**.
Direction	Select a direction or **All**. For an overview, see Inbound and Outbound Documents on page 35.
Standard	Select a standard or **All**.
Error Number	Select an error number or **All**.

4. Which internal (Transaction Insight host) partners will be included?

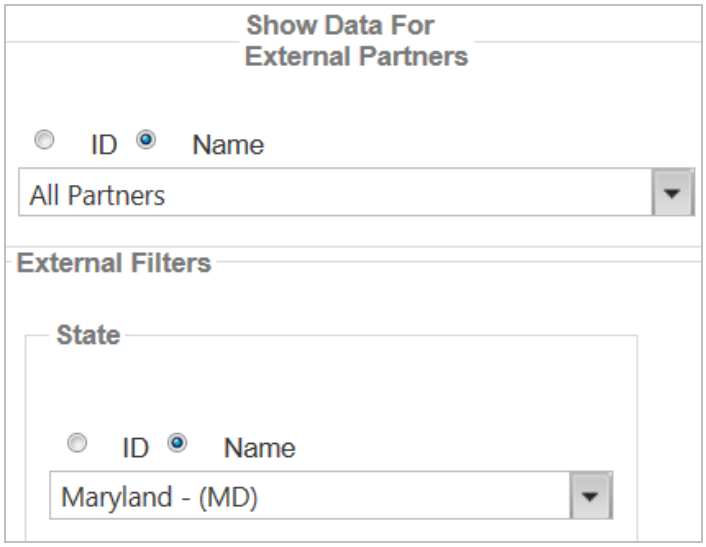
   Use **Show Data for Internal Partners** if you want to route a specific partner's data.

   Leave these fields set to All Partners to route all internal partners to whom the team members have access. If Internal Partner Filters have been set up, they will appear here. You can select from the filters or a specific partner, but not both.

5. What external partners are to be included?

   Use **Show Data for External Partners** if you want to select one particular external partner.

   Use any or all **External Filters** or **Group Filters** if you want multiple partners and have filters set up and assigned to select the desired partners. If External Partner Filters have been set up, they will appear here:

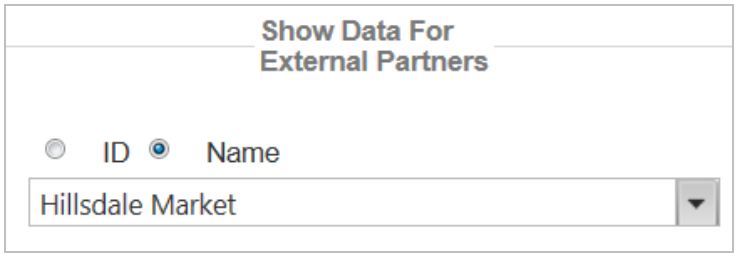


   You can select from the external filters or a specific partner, but not both.

   You cannot select both a particular partner AND external filters or group filters.

   Leave these fields set to All if the rule includes all external partners to whom the team members have access.

   This example specifies one particular external partner (Hillsdale), so no External Filters are used.



6. Click **Save Routing Rule**.

   Within a single rule, all conditions must be met for a document to be listed on this team's task list. The conditions within a rule are connected with a logical "AND."

   Where a team has multiple rules, any document selected by a single rule will be included in the team's task list. The rules themselves are connected with a logical "OR."

To set up additional rules, click **add new routing rule….**, type a name for the rule, and fill in the other fields. When finished adding routing rules, click **Next** and then **Finish**.

How Tasks are Assigned to Teams

When a routing rule is added or changed, it affects documents coming into Transaction Insight in the future. Existing documents are not retroactively re-routed by it.

Each team's routing rules should be as specific as possible to avoid having documents assigned to the wrong team.

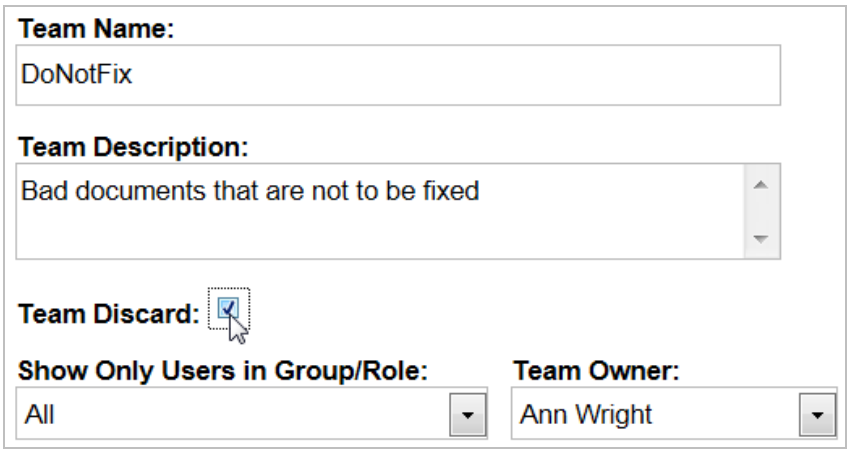
- If a document matches the routing rules of multiple teams, it appears in the task list for each of the teams. From there, it can only be assigned to one user. Any changes made by one team to its status, priority, etc., will appear for all teams.
- If a document is not routed by any team's routing rule, it goes to the Root Team. (See Root Team on page 72.)
- If a document matches the routing rule of a team with Team Discard selected, it is not assigned to any team including the Root Team. (See Team Discard on page 72.)

Team Discard

You can set up rules that select documents that are not to be assigned to any Transaction Insight team. This will prevent them from accumulating under Root team.

To do this:

1. Create a team and select **Team Discard**:



2. Give it routing rules that select all documents that are not to be assigned to teams.
3. Save.

Root Team

A default Root Team receives all un-routed tasks. This prevents documents with errors from getting lost.

The Root Team cannot do anything except reassign tasks:

1. Log in as **root**
2. Under Transaction Insight, choose **My Tasks**.
3. Select Root Team.
4. Select tasks to go to a particular team.
5. Use **Possible Actions | Change Team** and select a team to receive the tasks.

   You cannot move a task if it is locked by root (check the Status column).
6. Under Teams, set up a routing rule to send future documents like it to the correct team, if desired.

Maintaining Teams

1. Click **Teams**.
2. Click the name of the team.
3. Make your changes.

   To open a routing rule or role so that you can change it, click its pushpin.
4. Use the save buttons or links for the area of the page being changed.
5. To save changes to the Team Description or Team Members sections, click **Save** at the top right.

Team Role Changing and Assigning Chart

Page	Permissions	Users	Add/Delete
Teams | Edit a team	Change permissions of this team's roles. View permissions of template roles.	See which team members have this role. Assign roles to team members.	Add or delete roles.
Settings | Template Roles	Globally change team template role permissions.	(Regular users should have no access to Settings)	Add or delete template roles.

Using My Tasks

When new incoming data has errors and meets the team's rules, it displays in the task list under **My Tasks**. Only team members can see this page. See **TIB_transactioninsight_*version*_usersguide.pdf** for usage details.

Settings

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

Event Log See page 75	Displays a sortable list of various types of system events.
General Settings See page 77	Allows you to specify settings such as password requirements, enabling/disabling partner IDs, default date range for the Transmissions page, and more.
Statuses / Priorities See page 77	Allows you to globally add statuses and priorities for **My Tasks**. These apply to all teams.
Template Roles See page 84	Allows you to globally add roles for the **Teams** pages.
Messages See page 85	Allows you to customize the e-mail messages that go out to team members as a result of data errors or when a task is assigned to them.
Document Fields See page 85	Allows you to pick which additional fields are stored in the Transaction Insight database for each transaction set.
Error Settings See page 87	Allows you to designate specific HIPAA type 7 and 8 error numbers as ineligible for force through in Transaction Insight (Transaction Insight Healthcare edition only). See Force Through Processing in **TI_Reference_Manual.pdf**. Allows you to designate certain error numbers as internal or external. This is used with Restricted Error Correction.
External System Setting See page 88	Allows you to define external systems that send data to Transaction Insight. Instream is set up for you.
Portals See page 88	Allows you to add links to other websites (e.g., company intranet or third party software) which will appear on the Transaction Insight Portal landing page and menu bar.
LDAP Settings See page 88	Allows you to have Transaction Insight check users' login credentials in an LDAP server rather than in the Transaction Insight database.
Transaction Sets See page 92	Allows you to add transaction sets to the database so that you can set up transaction filters for them. See **Filters_for_FPP.pdf**.
Cache See page 98	Allows you to configure settings for cache retries and refreshes.
About See page 98	Contains copyright and version information about Transaction Insight.

Event Log

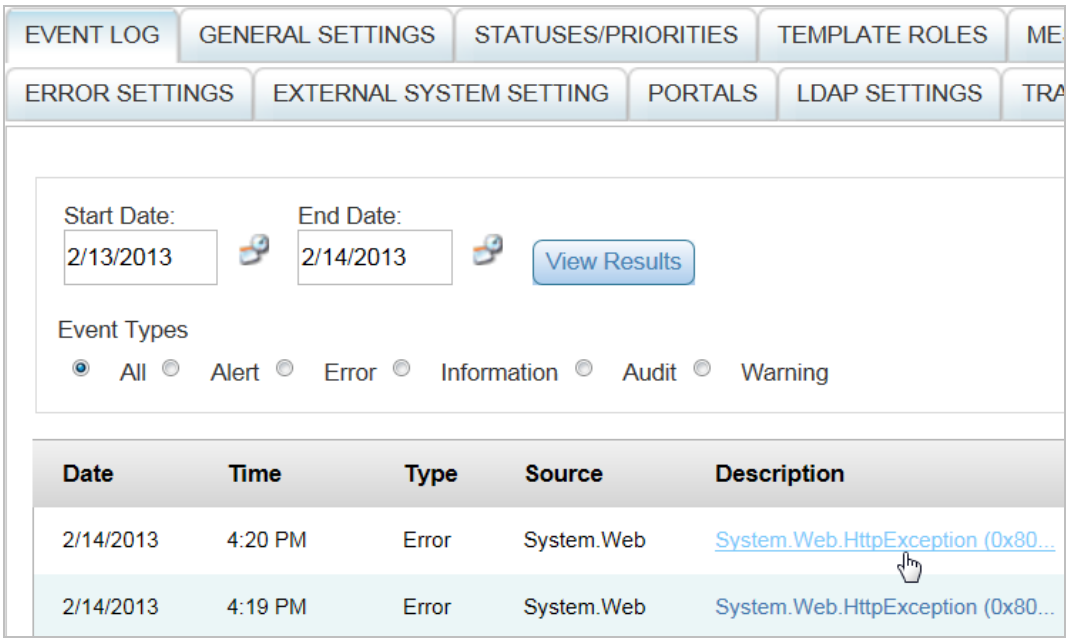
You can see system events under **Admin | Settings | Event Log**.

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

All	All system messages.
Alert	Log of Transaction Insight alerts that have been sent.
Error	System errors (not EDI data errors).
Information	System informational messages.
Audit	Various user actions (user logons, pages viewed, etc.). To start auditing future events, use this Web.config setting: `<add key="Auditing" value="true" />`. It greatly increases the size of your event log, which is stored in your Transaction Insight database and cannot be deleted, so consider whether you really need it. For details about what information is audited, see Security Features in Transaction Insight in **TI_Reference_Manual.pdf**.
Warning	System warnings.

Using these pages:

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



Periodic Administrative Tasks

To archive event log entries:

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

To delete events:

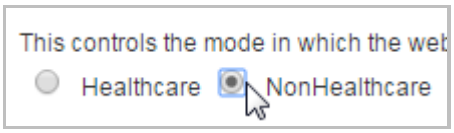
1. Archive them first if you'd like.
2. Select a date range and event type.
3. Click View Results.
4. Click Delete *type* Event Types from System.

General Settings

Product Mode

If portal users are all non-healthcare staff, you can suppress healthcare information in Transaction Insight and Common Administration.

To do this, log on to the portal as an administrator and choose **Settings | General Settings**. Under **Product Mode**, you can choose:



You will need to restart IIS if you change the mode.

The following information is suppressed in NonHealthcare mode:

Transaction Insight

- DRG Usage, ICD Usage, ICD Statistics, Code Lookup, 275 and 277 Attachments pages
- AMA copyright on Document Summary Page
- Error message wording options

Common Administration

- HIPAA Level 7 Error Exclusion Settings under **Settings | Error Settings**
- The AMA copyright in a form's error message is not affected by the Healthcare/NonHealthcare setting - it always appears in healthcare documents

Product Name

You can change the default portal name:

Do this under **Admin | Settings | General Settings**. Under **Product Name**, you can type your own text:

Click **Save Changes** at the bottom.

The next time you perform an **iisreset**, the new name will appear.

Additional customizations

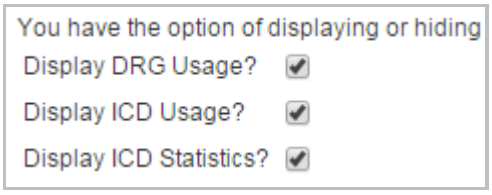
To further personalize your Portal, you may wish to customize the page that appears when exceptions occur. See Appendix G - Exception Page Customization on page 169.

Password Expire Period
Reuse Password Aging
Strong Password Required for ALL users?

Password Expire Period	Type the number of days that a password is valid.
Reuse Password Aging	Type the number of days until a password can be reused.
Strong Password Required for ALL users?	This sets minimum length and other password requirements. All users except root will be prompted for a new password the next time they log in. This includes those with passwords that never expire. If a user tries to change the password to one that is not compliant, a message displays current requirements. a. Choose **On** and click **OK** when asked to confirm (you will still have to Save Changes at the bottom). b. Type a minimum password length. c. Select any other requirement that their passwords must meet. d. Save changes.

Page Settings

You may be able to display or hide certain pages under **Page Settings**. If so, they will be listed here.



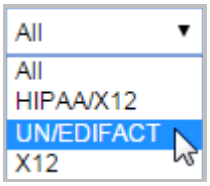
These are automatically hidden for Transaction Insight Standard Edition.

The next time you perform an **iisreset**, the change will take effect.

Default Standard

You can select a default standard for use in filters for all users.

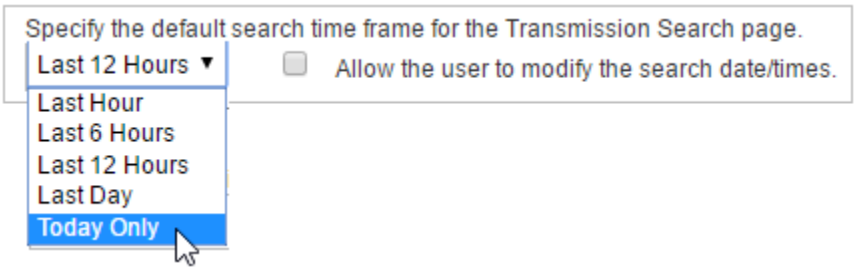
The specified default standard is displayed any time the Standard filter is used. This example chooses UN/EDIFACT as the default standard:



Other standard choices are still available and can be selected manually from the drop down list.

Transmission Search Default Time Frame

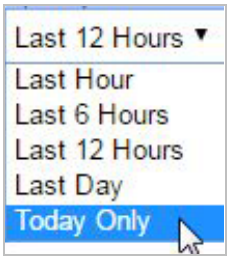
Use the dropdown menu to set the default search time frame for the Transmission Search page. Optionally, you can select the checkbox to allow users to modify the search date/times on the page manually.



The default value appears as the first search time selection on the Transmission Search page Time Control drop down menu.

To use this setting:

1. Select a default Search Time value from the drop down menu. By default, this value is set to "Last Hour."

   Note:

   - The "Today Only" option is defined as from 00:00 to the current time.
   - The system always rounds up to the nearest 5-minute increment. This ensures that the End Time includes the most recent transmissions.
     Example: If the default is "Last 6 Hours" and the current time is 13:32, the Start Time will be 7:35 and the End Time will be 13:35.

2. Specify if users are allowed to modify the search dates and times on the Transmission Search page.

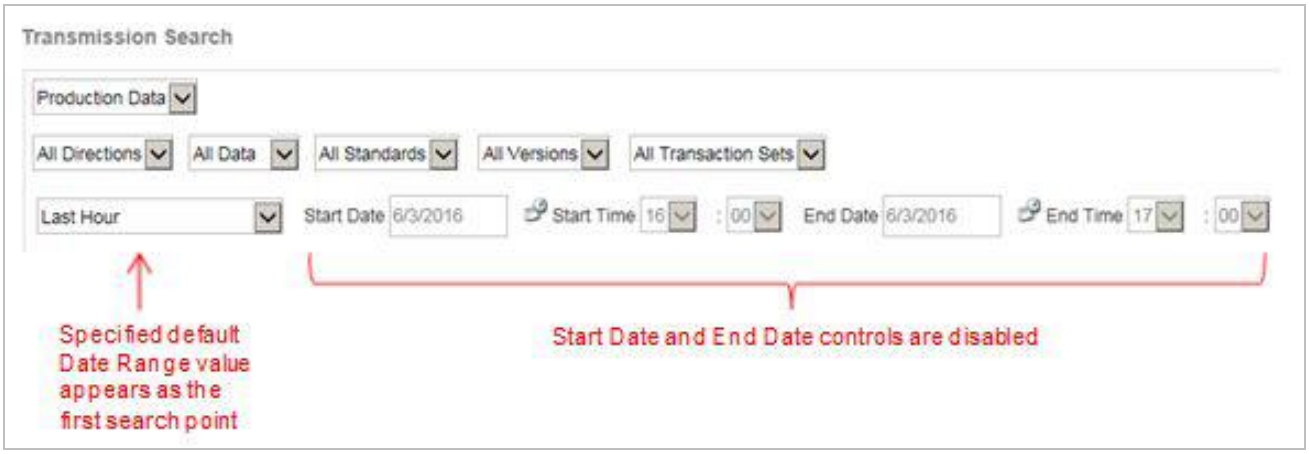
- Checked = the Start Date and End Date controls are enabled on the Transmission Search Page.
- Unchecked = (default) the Start Date and End Date controls are disabled on the Transmission Search Page.

To re-enable the Start Date and End Date controls, the user must select "Set Custom Date Range"from the drop down menu on the Transmission Search Page.

3. Click the Save Changes button to save your selections.

Example:

If the default Search Time Range is set to "Last Hour" and the "Allow the user to modify the search date/times" option is unchecked, the initial presentation of the Transmission Search page time/daterange search area appears to the user as shown here:



275AttachmentFileMaximumSize

Enter the Maximum Size limit for the 275 attachment file in megabytes where 64 indicates 64 MB. Default is 64.

275AttachmentFilesDirectory

Enter the path where 275 attachment and DDE files should be stored on the Transaction Insight portal machine.

- Do not use quotation marks in the path.
- Be sure the path ends with a slash or back slash (/ or \).

Example: C:/Foresight/TransactionInsight/275Attach/

Note: ASP.net and network service users need read/write permission for the specified folder.

277AttachmentRequestFilesDirectory

Enter the path where 277 Attachment Requests should be stored on the Transaction Insight portal machine.

- Do not use quotation marks in the path.
- Be sure the path ends with a slash or back slash (/ or \).

Example: C:/Foresight/TransactionInsight/

277AttachmentRequestTemplateFile

Enter the path and filename of the 277 Attachment Requests template file.

By default, this is set to ~/277Settings.xml

Allow Leading Wildcards

A wildcard at the beginning of a search term is called a **leading wildcard**. The use of leading wildcards in a search can cause slow queries and impact response time. Use this setting to control the users' ability to search using leading wildcards.

Select the desired functionality:

- On - leading wildcards (e.g., *testsearch) are allowed

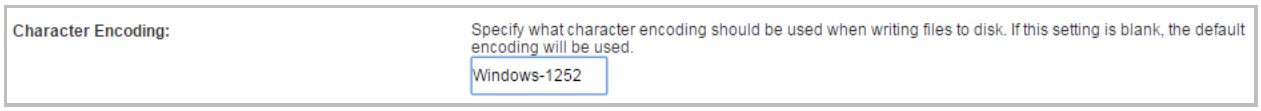
  If On is selected, the Transaction Insight user interface displays a warning informing the user about slow response times.
- Off - (default) leading wildcards are not allowed.

Character Encoding

(Optional) This setting can be used to override the default character encoding set when writing files to disk during revalidation. To do so, enter a supported encoding name as defined in the "Encoding Class" documentation on the Microsoft Developer Network (https://msdn.microsoft.com/en-us/library/system.text.encoding(v=vs.110).aspx).

By default this setting is blank, indicating the default encoding of the web server operating system is used.

Example: To handle characters outside the legal range for ASCII (i.e., greater than 127), enter Windows-1252, which accepts an extended character encoding set.



DefaultDateRange

Type the number of days to display on the listed pages. The default number is 8.

Pages Displayed in Tree View

Type the number of page links to be displayed under Tree View control on the Document View page. The default number is 5.

Note: The Tree View control is not displayed in all modes of the Document View page.

Document Landing Page

This affects external identifiers and is ignored if you do not use that feature. Please see **External_Identifiers.pdf** for more information.

Choose the Transaction Insight page where the user will go when viewing a file found via direct link from its external identifier or other custom unique identifier.

- Document View - See the document in a form
- Document Summary - See the document's Document Summary page

If multiple documents are found, the user will go to a table listing all documents found. They can then choose the page.

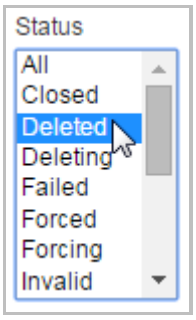
Include Identifier values for External Partners?
Include Identifier values for Internal Partners?

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

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

Statuses / Priorities

When setting up a Transaction Insight team, you can define the entries for the status and priority filters that are used by team members under **My Tasks**.



If you have certain statuses and/or priorities that should be in these lists for *all* teams, set them up globally under the **Admin | Settings | Statuses/Priorities** tab. This is retroactive to teams that already exist.

To set up a new entry for these lists:

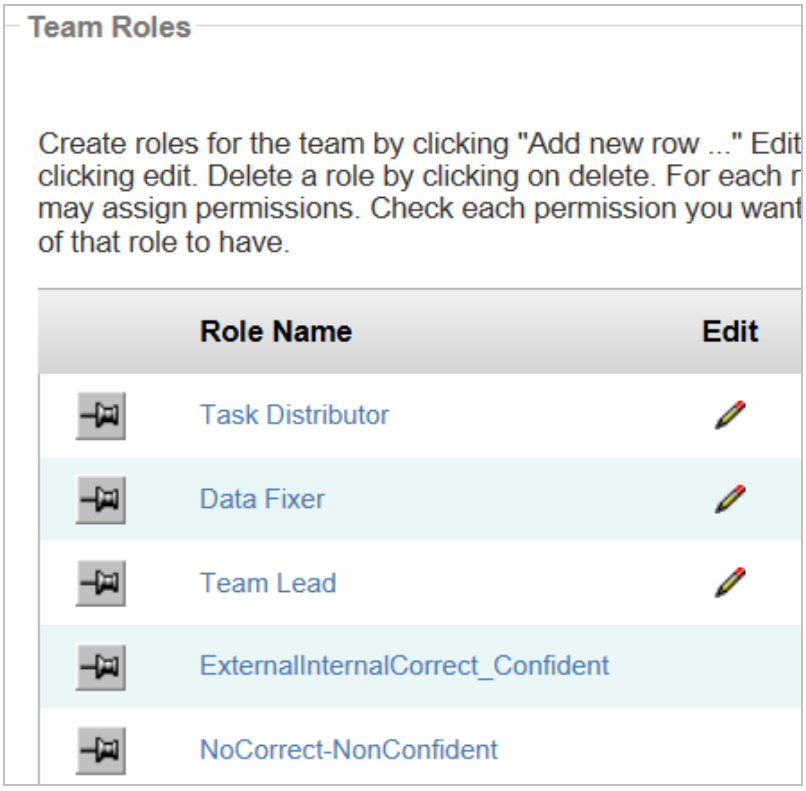
1. Go to the **Statuses/Priorities** tab of the **Settings** page to see statuses:
2. Click **Add new status** … or **Add new priority**….
3. Type the name.
4. Click **Save**.

Team members will see the new status or priority in the filters under **My Tasks**.

You can edit the ones that you added by clicking in the Edit column, or delete it by clicking in the Delete column.

Template Roles

When setting up a Transaction Insight team, you can define roles for that team's members:



Roles in this list come from two places:

- When creating or editing a specific team, you can define roles that affect that team only. See Team Roles on page 67.
- Under **Settings | Template Roles,** you can set up roles that apply to all teams, including ones that already exist. These are described below.

To set up a new template role:

1. Click **Admin | Settings | Template Roles | Add new template role ….**
2. Type the Role Name.
3. Click **Save**.
4. Click its edit pencil.
5. Select the permissions that team members with this role will have. These are described in Portal Permissions on page 131.
6. Click Save Changes.

You can edit this role here, under **Admin | Settings |Template Roles**.

The role will show up under the Teams menu for all teams, but it will be read-only. In the example above, we can tell that the last two roles are template roles because they do not have a pencil under the Edit column.

Messages

Use **Settings | Messages** to customize the e-mails that go out to alert Transaction Insight team members about task assignments and documents containing errors. These changes affect all e-mails for all teams.

Who Gets Team e-mails?

- To get e-mails, team members must have a working e-mail address and have either **All emails** or **Only one until next login** (see Setting up New Users on page 52).
- Team members get e-mails when tasks are assigned to them.
- Team owners get e-mails when tasks arrive for the group.

The types of team e-mails that you can customize include:

- Those sent to team owners when a document with an error arrives for the team. Edit this one by clicking **New bad document**.
- Those sent to team members when they are assigned a task. Edit this one by clicking **Task assignment**.

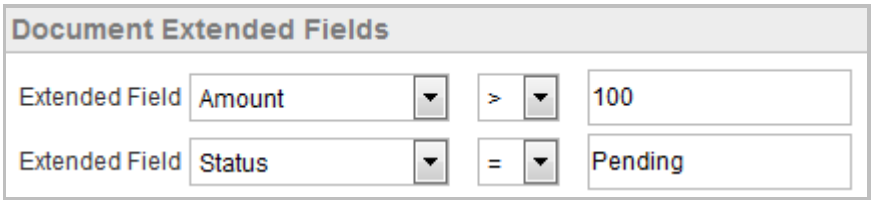
Customizing team e-mails

1. Click on one of the two lines.
2. Type the subject and text. When it sends an e-mail, Transaction Insight automatically adds a link at the end of the message that points to the specific page.
3. Click Save changes.

Document Fields

This page lets you store additional information in the Transaction Insight database for a particular transaction set or message. Your users can then filter on this information on Search pages and see the information on a Document Summary page.

Example extended fields on the Search Documents pages:



Some documents have extended fields already identified:

Extended fields have already been identified for HIPAA and "known types" of transactions and messages and await your selection on the **Settings | Document Fields** page (Transaction Insight Healthcare edition only).

For other transactions and messages, you will need to identify these fields yourself, and then select them on the **Settings | Document Fields** page. Please see What is an Extended Field? on page 165 and Creating Extended Fields in **Data_Types_and_TI.pdf**.

To choose extended fields:

1. Under **Admin | Settings | Document Fields**, select the standard and transaction or message in the upper right corner.

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

   Those in **Available Fields** are not being stored in the database.

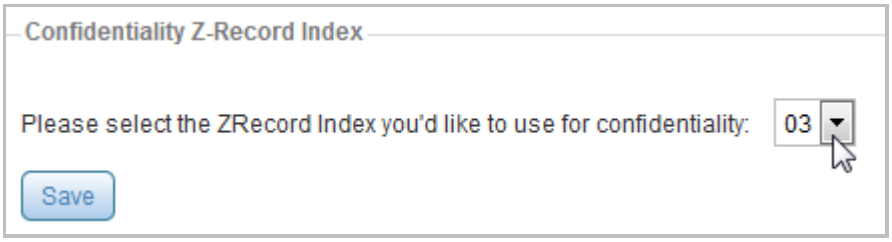
   Those in **Fields to store in database** are being stored and users can display them with Choose Fields on the Transmissions page.

3. To identify confidential fields on the Document Summary page, move them from **Un-Filtered Fields** to **Confidential Fields**. This does not affect the field's display on a form, which is set up separately. Please see Managing Confidentiality in Transaction Insight in **TI_Reference_Manual.pdf**.

4. Click **Save Changes.**

Documents imported in to Transaction Insight in the future will have the chosen information stored in the database.

The **Confidentiality Z-Record Index i**dentifies which documents are considered confidential. This is explained further in Managing Confidentiality in Transaction Insight in **TI_Reference_Manual.pdf**.



Error Settings

You can customize the effect of errors under **Settings | Error Settings**.

HIPAA Level 7 Error Exclusion Settings

(If Force Through is enabled)
(Transaction Insight Healthcare edition only)

To prevent specific HIPAA Type 7 or 8 errors from being eligible for Force Through, add the error numbers here. See Force Through Processing in **TI_Reference_Manual.pdf**.

Restricted Error Correction

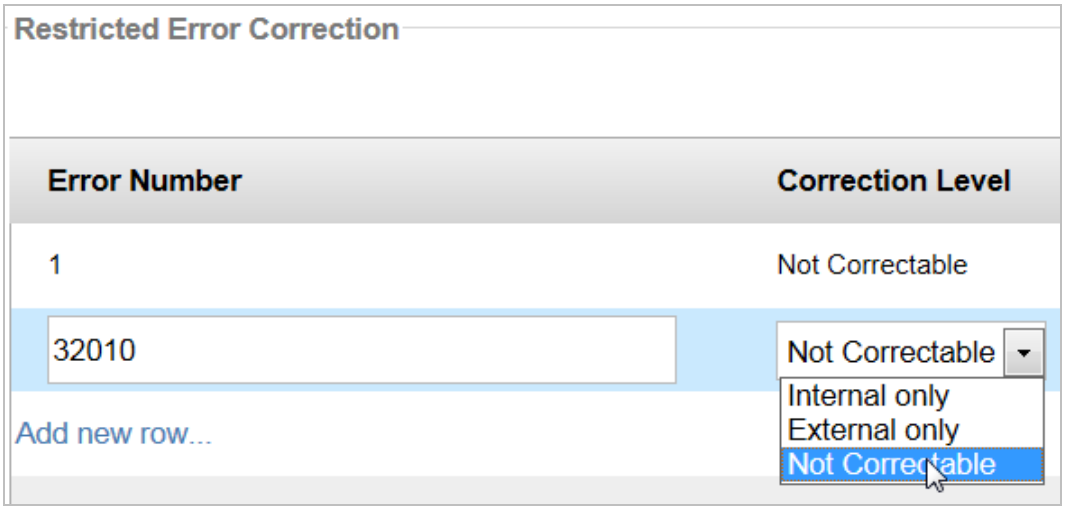
This section lets you customize correction of specific error numbers.

When you edit an error in the list, or add a new error number, you have these choices in the Correction Level column:

Not Correctable If a task has this error, do not allow edit access to the form. This is generally used for errors that cannot be corrected on forms. For details, see Opening a Form in the **TIB_transactioninsight_*version*_usersguide.pdf**.

Internal Only If a task has this error, only someone with a team role that includes Internally Correctable can edit the form.

External Only If a task has this error, only someone with a team role that includes Externally Correctable can edit the form.



Errors must be in the Transaction Insight database's ErrorDefinitions table. Please see **Transaction Insight's Database** in **Synchronizing_TI_and_Instream.pdf** for instructions.

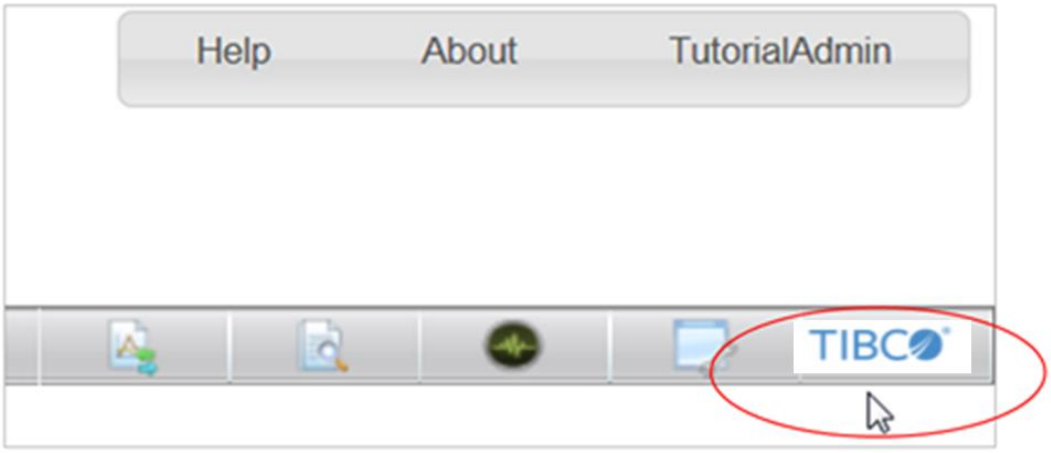
External System Setting

The External System Setting tab lets you define relationships to systems external to Transaction Insight. This is a necessary step before any external system can send error codes into Transaction Insight.

Portals

Under **Admin | Settings | PORTALS**, you can add other websites to your main portal page, like this:

This also appears at the top right once you have entered one of the portal applications, like this:



To set up a new item on the portal:

1. Click **Admin | Settings | PORTALS | Add New Portal …** .

2. Fill in these fields and then save.

Name	Name of your choice, to appear as a link next to the icon on the main portal page.
Image Path	Path to the image that will appear on the main portal page.
Menu Item Image Path	Path to the image that will appear on the menu bar.
Redirect Url	Action to take when the user clicks this icon.
Tooltip	Text that appears if the mouse hovers over the icon.

3. Logout and log back in.

4. You should be able to click the new icon on your portal and see the application or website in a pop-up.

Example

We added the bottom line to the PORTALS tab:

Name	Image Path	Menu Item Image Path	Redirect Url	Tooltip
Transaction Insight	~/images/transactioninsight.png	~/images/transactioninsight_small.png	~/Default.aspx	Transaction Insight
Archive	~/images/archive.png	~/images/archive_small.png	~/Default.aspx	Archive
Operational Monitor	~/images/operationalmonitor.png	~/images/operationalmonitor_small.png	~/Default.aspx	Operational Monitor
Common Administration	~/images/commonadmin.png	~/images/commonadmin_small.png	~/Default.aspx	Common Administration
TIBCO Website	~/images/tibco_big.png	~/images/tibco_small.png	http://www.tibco.com	http://www.tibco.com

After logging out and in, we see this on the main portal page, right after Common Administration:

From within Transaction Insight Foresight Archive and Retrieval System, Foresight Operational Monitor, or Common Administration:

Menu Item Image Path graphic

LDAP Settings

Under **Settings | LDAP Settings**, you can have Transaction Insight check users' login credentials in an LDAP server rather than in the Transaction Insight database.

Once you check **Enable LDAP** in the portal:

- If you already have Transaction Insight users, their ability to log in might be affected during the transition, so plan accordingly.
- All Transaction Insight users except root will be authenticated with LDAP credentials. This includes the user that you are using to make the LDAP changes.

- Existing users who have the same email in Transaction Insight and LDAP can log in using their LDAP password. Others will have to wait to be added to LDAP or to have their emails updated in Transaction Insight.
- Root is always authenticated through the Transaction Insight database and is unaffected by LDAP.

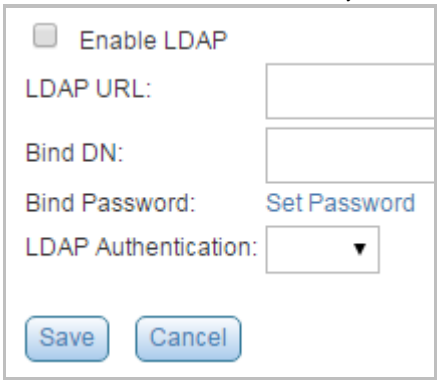
LDAP has been tested with ActiveDirectory 2003 and OpenLdap 2.4.25.

Once LDAP is enabled, the user must pass these steps during portal login:

1. Does the email and password that was entered by the user exist in the LDAP directory?
2. Does the email exist in the Transaction Insight database?
3. Is user defined as active in the Transaction Insight database?

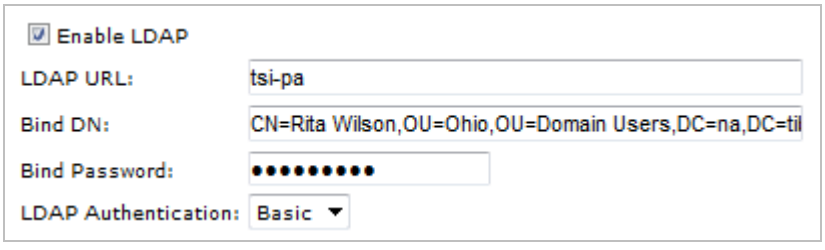
Steps to set up LDAP

1. Notify your uses that their access may be temporarily disrupted and they will log in to the portal using their LDAP email address and password.
2. Gather this information from your network administrator:



3. Check Enable LDAP under Settings | LDAP Settings.
4. Fill in the other information to access LDAP.

   Example:



Basic authentication means passwords are sent to the portal in clear text and SSL means they are encrypted.

LDAP is now working.

After that:

- **New Transaction Insight users**
  Create users in Transaction Insight using the LDAP email address, assign them roles and partner groups, and set them to Active. Do not enter a password.
- **Existing Transaction Insight users**
  Be sure all existing users have the same emails in Transaction Insight and LDAP. Where there is a discrepency, adjust the portal email address.
- **Deleting Transaction Insight users**
  Delete them from the portal. This does not delete them from LDAP.
- **Synchronizing LDAP and Transaction Insight**
  This does not happen automatically. If you change the email address in LDAP, do the same in the Transaction Insight portal. Transaction Insight does not make use of the LDAP groups or roles.

Example

Assume that you have these users:

User Name	Email	Active
Abby Adams	abby@hillsdale.com	Yes
Highpoint	highpoint@highpoint.com	Yes
Lindalee Brownstein	lbrownst@tibco.com	Yes
mike	mike	Yes
Portal Administrator	TAMSadmin@horizon.com	Yes
root	root	Yes

Check the LDAP directory for the email addresses for Abby, Highpoint, Lindalee Brownstein, and Portal Administrator and adjust them in the portal if necessary.

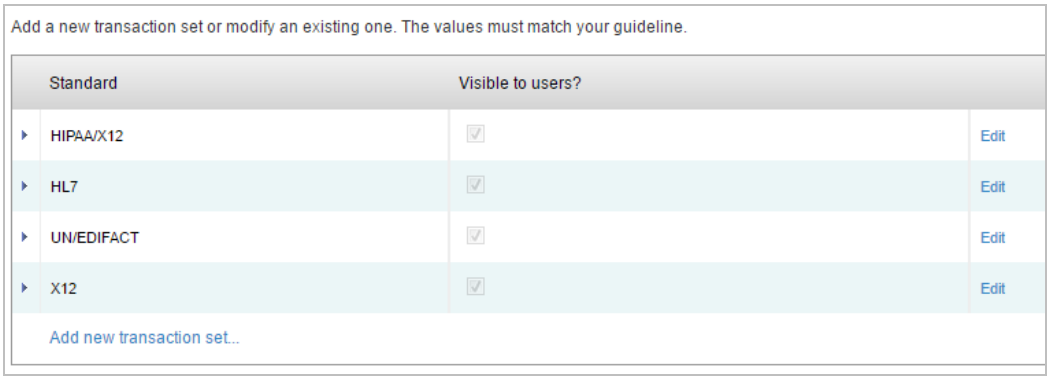
Mike will need to be changed to an LDAP email address.

Root will continue to log in as before with the Transaction Insight credentials.

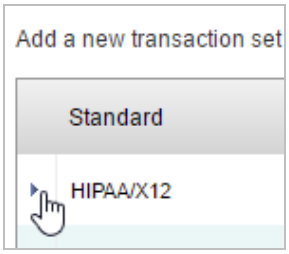
Transaction Sets

Under **Settings | Transaction Sets**, you can

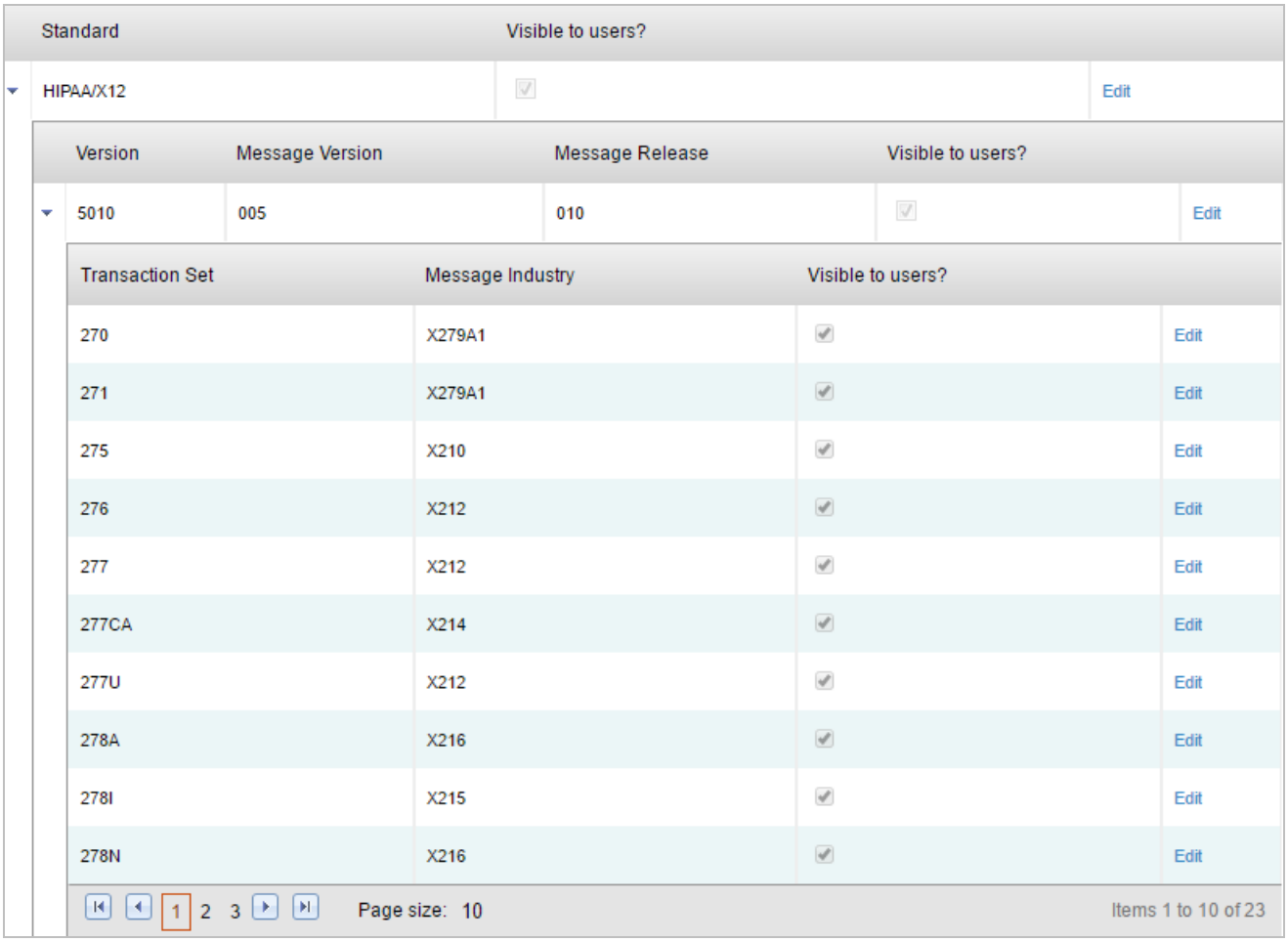
- add new transactions and messages
- hide transactions.



Use the arrow to expand and collapse a transaction set.



Transactions are displayed hierarchically by standard and version.



Standard	Visible to users?	
HIPAA/X12	☑	Edit

Version	Message Version	Message Release	Visible to users?	
5010	005	010	☑	Edit

Transaction Set	Message Industry	Visible to users?	
270	X279A1	☑	Edit
271	X279A1	☑	Edit
275	X210	☑	Edit
276	X212	☑	Edit
277	X212	☑	Edit
277CA	X214	☑	Edit
277U	X212	☑	Edit
278A	X216	☑	Edit
278I	X215	☑	Edit
278N	X216	☑	Edit

1 2 3 Page size: 10 Items 1 to 10 of 23

Adding New Transactions and Messages

If the guideline used to validate data does not have transaction filters, you do not need to do this, and can just import the new transaction or message's data.

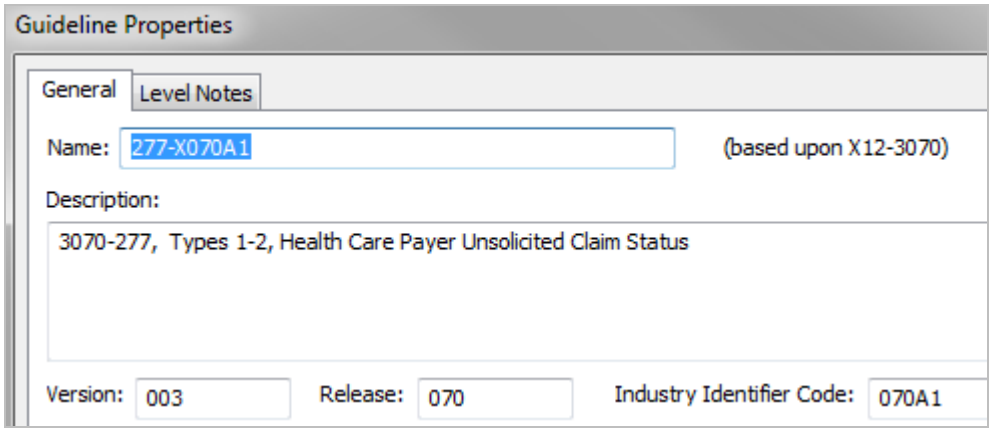
If the guideline does have transaction filters or extended fields, you will need to add the transaction set or message to this tab before you set up the filters or extended fields in Common Administration.

You cannot edit or delete, so enter information carefully.

To add a transaction or message:

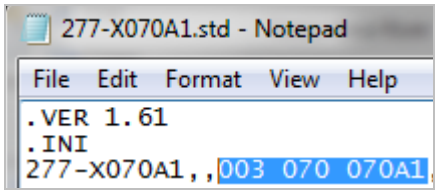
1. Determine its version, its release, and its industry code (if any):

   Open the guideline in EDISIM® Standards Editor, choose **File | Properties | General** tab and note the Version, Release, and Industry code:

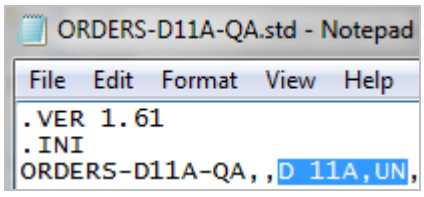


   If you can't open the guideline in Standards Editor, open its STD file and look in the INI section.

   X12 example:



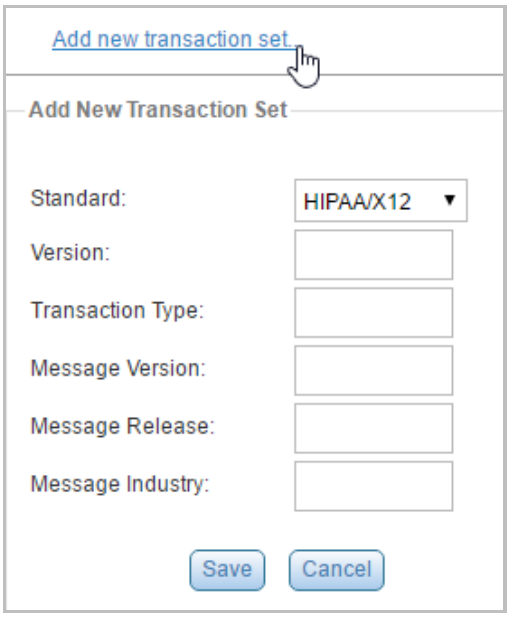
   EDIFACT example:



2. In Common Administration, look in all pages at the bottom right of the Transaction Sets table to see if that combination already exists. You can click on a column heading to sort by that column. If so, do not add it again.

3. If not, find a similar one to use as a pattern.

4. Under **Settings | Transaction Sets**, click Add new transaction set … .



Select the standard from the drop-down menu and type the rest of the values:

Version	X12: 4-digit X12 version, such as 5010. EDIFACT: directory version, such as D.12A.
Transaction Type	X12: 3-digit transaction set ID, such as 850 EDIFACT: 6-character message ID such as ORDERS
Message Version	X12: 3-digit major version such as 005. EDIFACT: Major version such as D or 91.
Message Release	X12: 3-digit release such as 010. EDIFACT: release such as 11A or 1.
Message Industry	X12: industry code, such as 070A1, if any. EDIFACT: controlling agency, if any.

5. Click Save or Cancel.

Hiding and Showing Transactions

You can hide or show transactions either per transaction set, per version, or per standard using the "Visible to users?" checkbox.

When a transaction set, version, or standard is hidden, it is not shown in any drop-down menu **with the exception of the Transaction Sets page**.

This does not prevent hidden transaction types from being imported. If a hidden transaction type is imported, the hidden transaction appears in all statistical and search results, although the value does not appear in the dropdown.

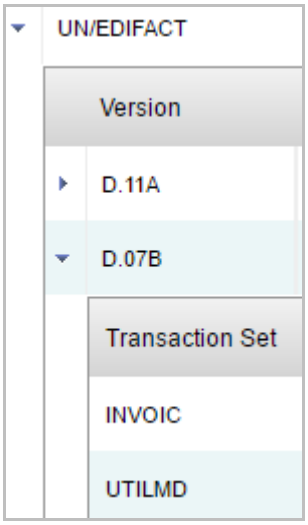
Example: If the administrator has hidden the 837DP type transaction, it does not appear in any drop-down menu. If an 837DP is imported, it will be included in the counts for the Transmission Volume page even though 837DP is not in the drop-down menu.

The Standard and Version levels of the table use a three-state checkbox. If the checkbox is:

- Checked - all transaction sets of the version or standard are visible to users
- Filled in- some transaction sets are visible to users and some are hidden
- Unchecked - no transaction sets are visible to users.

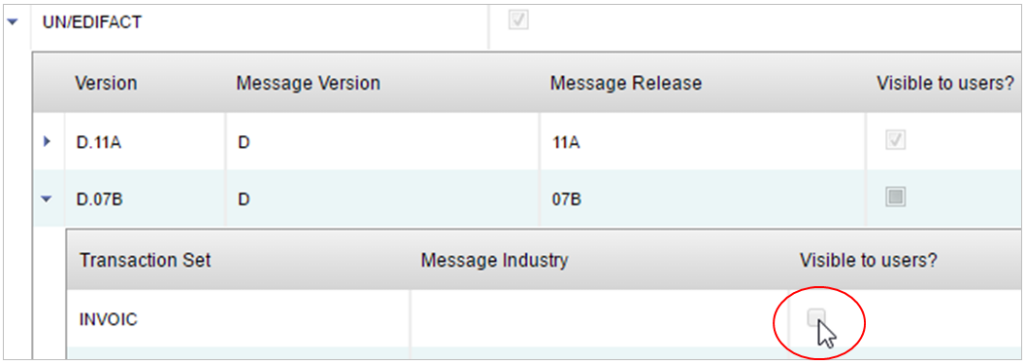
To hide or show a transaction:

1. Under **Settings | Transaction Sets**, drill down to the specific transaction set, version, or standard you wish to hide from or show to users. For example: UN/EDIFACT > D.07B > INVOIC.



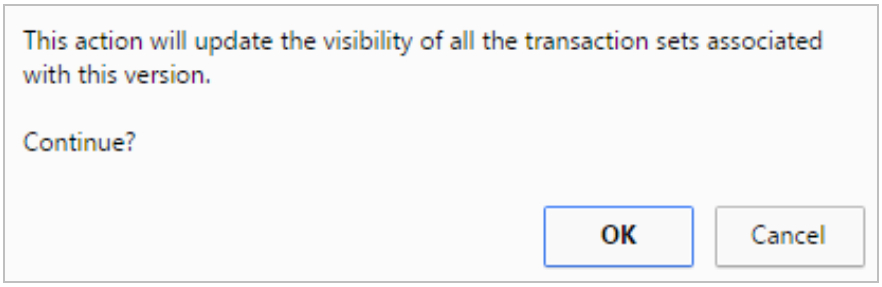
2. Click Edit.

3. Select (make visible) or unselect (hide) the Visible to users? checkbox.



4. Click Update (save changes) or Cancel.

5. You will be asked to verify the change. Click OK or Cancel.



Cache

Under Cache, you can specify:

- Refresh time - how often the cache will automatically refresh
- Retry count - how many times to retry loading the cache data before failing.

Refresh times are entered in minutes. Defaults for the options are as follows:

Time or Count	Default
AdminPartnerFilter cache refresh time:	720
AdminPartnerFilter cache retry count:	5
FieldDefinition cache refresh time:	1440
FieldDefinition cache retry count:	5
Partner cache refresh time:	60
Partner cache retry count:	20
PartnerFilter cache refresh time:	720
PartnerFilter cache retry count:	5
TransactionSet cache refresh time:	20
TransactionSet cache retry count:	1

Note that settings take effect the next time the thread wakes up. For example, assume the Partner cache is set to run every 60 minutes and has been sleeping for 20 minutes. A user then resets the refresh time to 10 minutes. The thread will continue to sleep for 40 minutes, perform the refresh, and then continue to refresh on the newly specified 10 minute cycle.

About

The About tab contains copyright and version information about Transaction Insight. Expand the Version Information section by clicking on the "+" icon to the left of the heading.

Alerts

Under Alerts, you can define Transaction Insight conditions that will generate e-mails, including the occurrence of an event, the non-occurrence of a scheduled event, or particular trends. When AlertProcessor runs, it sends emails for alerts that have been triggered.

Setting up an Alert

For an e-mail to be triggered, ALL filters and conditions in the alert must be satisfied.

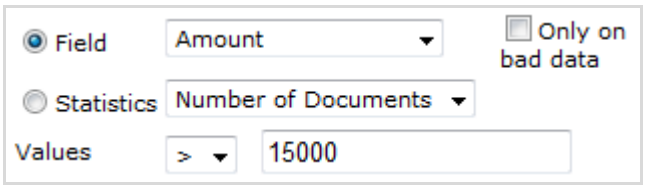
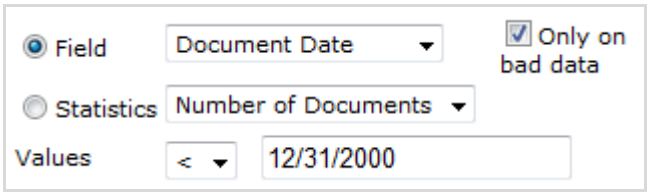
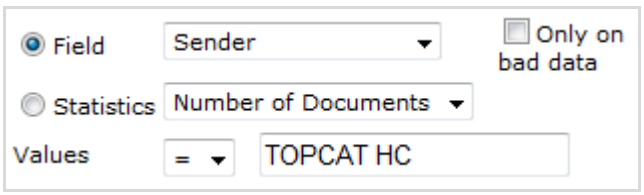
<table>
<tr><th>Item</th><th>Explanation</th></tr>
<tr><td>Name</td><td>Text of your choice to serve as the name for this alert.</td></tr>
<tr><td>Active</td><td>Do you want Alert Processor to process this alert?</td></tr>
<tr><td>Filters</td><td>What documents do you want Alert Processor to consider as it looks for the Conditions?</td></tr>
<tr><td colspan="2">Conditions - Choose one of the options described below: Unidentified Sender or Receiver, Field, or Statistics</td></tr>
<tr><td>Unidentified Sender or Receiver</td><td>Do you want to be alerted when a document comes in with an unidentified sender or receiver?
<table>
<tr><th>Partner Name</th><th>Identifier</th><th>Description</th></tr>
<tr><td>Hillsdale Hospitals</td><td>H1</td><td></td></tr>
<tr><td>HILLSDALE MARKET</td><td>HH</td><td>Big box stor in New Jerse</td></tr>
<tr><td>HILLSDALEWHOLES</td><td>HILLSDALEWHOLES</td><td>[Created by Importer]</td></tr>
<tr><td>Horizon East</td><td>HE</td><td></td></tr>
</table></td></tr>
<tr><td>Field</td><td>Do you want to be alerted when a certain element contains data which certain characteristics (specified in the Values field below). Fields common to all transactions are listed. In addition, if you select a transaction above, that transaction’s extended fields are also listed.

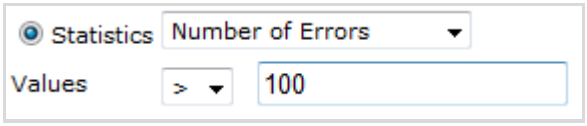
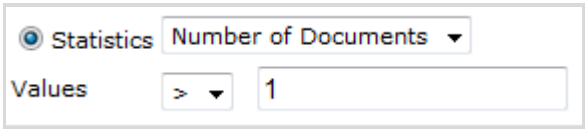
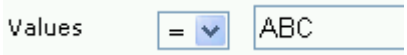
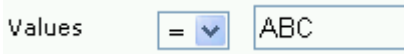
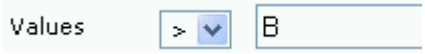
If you select Field, also select Transmission(s) under schedule.

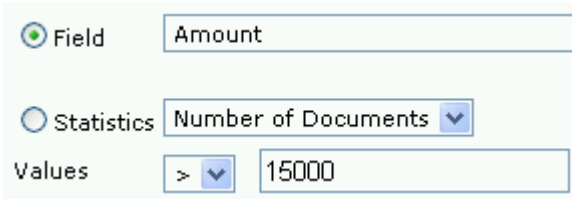
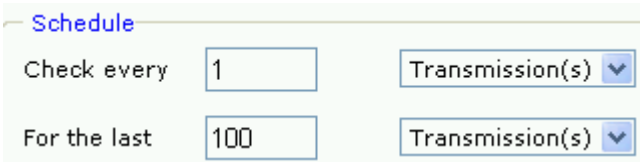
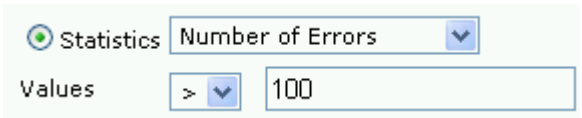
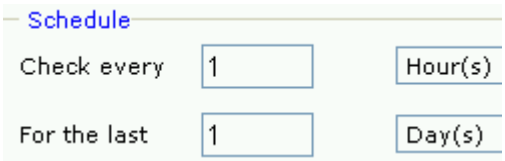
Fields are described in Appendix C of TIB_transactioninsight_version_usersguide.pdf.

Schedule
Check every 1 Transmission(s)
For the last 1 Transmission(s)

The Only on bad data checkbox applies to the Field condition.</td></tr>
</table>

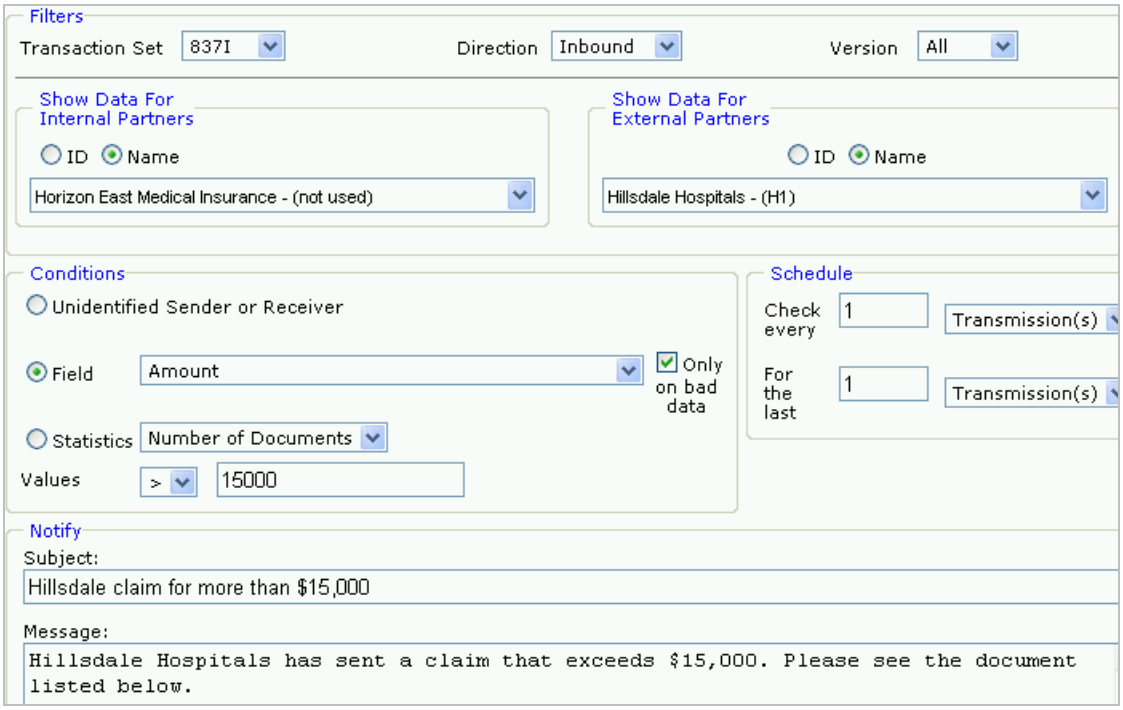
Item	Explanation
	 When checked, the alert is triggered only when the conditions specified in Field are met and the data is bad. When unchecked, the alert is triggered when conditions are met regardless of whether the data is good or bad. **Field example 1**: Alert sent if document arrives with value greater than 15000 in the Amount field. (The Number of Documents is not selected and is therefore ignored).  **Field example 2**: Alert sent if document arrives with Document Date before December 31, 2000 and the document contains bad data:  **Field example 3**: Alert sent if document arrives with Sender field containing TOPCAT HC. Trailing spaces must be typed here. 

Item	Explanation
Statistics	Do you want to be alerted when certain statistical conditions occur (specified in the Values field below)? **Statistics example 1**: Alert sent if the number of errors exceeds 100 in the timeframe specified under Schedule. Each error in a file counts toward this number.  **Statistics example 2**: Alert sent if no documents arrive during the timeframe specified under Statistics. 
Values	This specifies the rest of the condition started with the Field or Statistics options. With the Field option, Values can be alphabetic, date calculations, or numeric. **Example 1**: Field must contain exactly “ABC”  **Example 2**: Field must contain ABC plus 5 blanks  **Example 3**: Field must start with A **Example 4**: Field must start with C, D, E, etc.  With the Statistics option, Values are numeric. Success rate is shown as a whole number (enter 50 to indicate 50%). This field is ignored with the Unidentified Sender or Receiver option.
Schedule	**Check every**: In how many transmissions must the condition be met, or in how much time, in order to trigger the alert email? **For the last**: How often should Alert Processor check for the conditions in this alert? **Example using Field**: Once every 100 transmissions check to see if any transmission has an Amount greater than 15000. Since the Field option was selected, the Schedule will be set to Transmission(s).

Item	Explanation
	  **Example using Statistics**: Once a day, Alert Processor will check to see if there were any hours where the number of errors in transmissions exceeded 100.   If AlertProcessor ran at 10 p.m. on Jan. 5, it would check each hour from 10 p.m. on Jan 4 to 10 p.m. on Jan. 5 to see if there were more than 100 errors in that hour.
Notify	Subject and content of the e-mail that will be sent if the conditions are met. A link to the document is automatically included after the text that you enter. The sender and SMTP server are specified in AlertProcessor.exe.config.
How often should emails be sent	Should emails for this alert be sent each time the conditions are met for this alert, or should each recipient get only one email until they log in? Alerts will use this setting, regardless of the specific user's email settings.
Users in System **Teams in System**	Select Transaction Insight users and teams to receive emails if the conditions are met. If you select a team, all team members receive the emails.

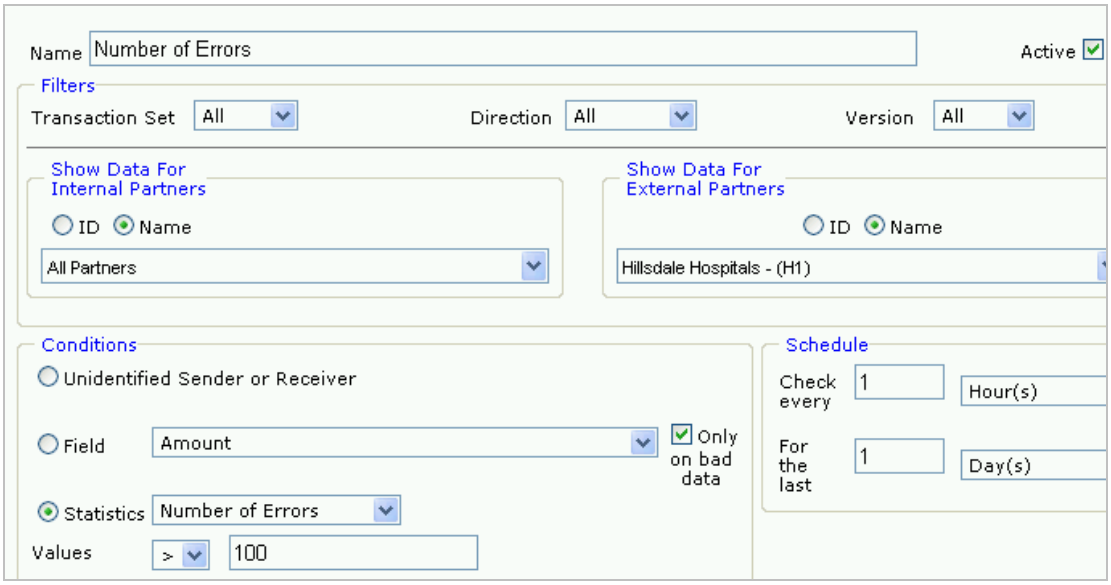
Example Field alert

This will answer the question: Was there an amount of more than 15000 in any transmission since the last time Alert Processor executed? Alert Processor checks after each transmission.



Example Statistics Alert

This will answer the question: Are we getting more than 100 errors per hour from Hillsdale Market? Alert Processor checks for this condition once a day.



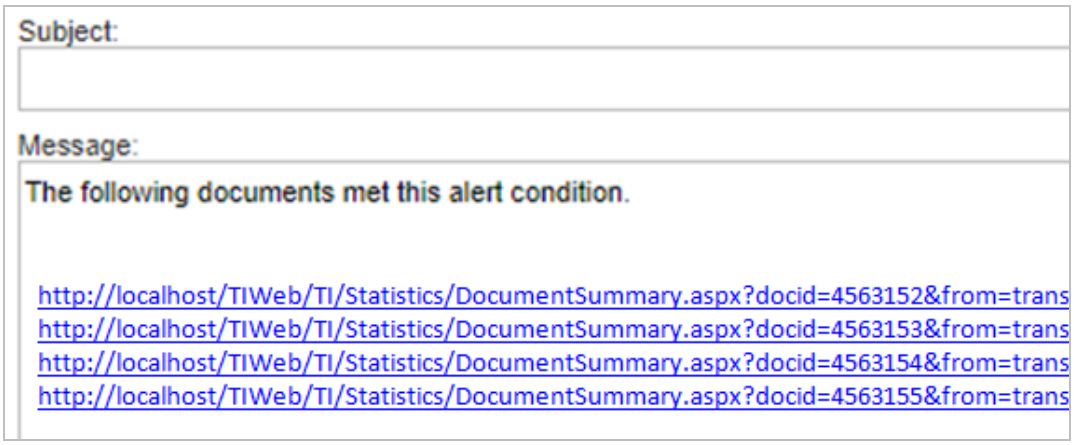
Configuring Alert Emails

When adding or editing an alert, the Notify section of the Alerts page lets you specify the recipients and contents of an email to be sent when the alert is triggered.

Contents of email

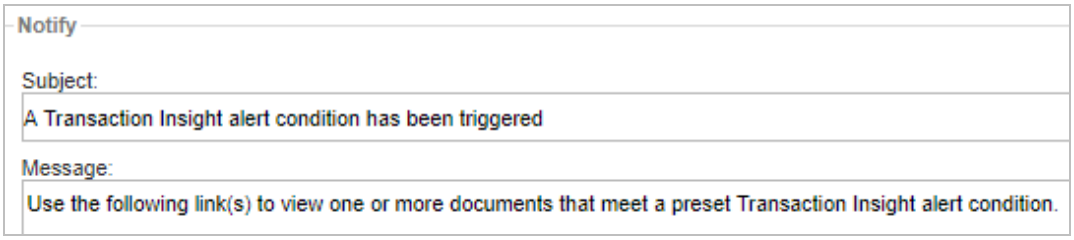
Default message

With no customizing, the email will consist of a message like this:

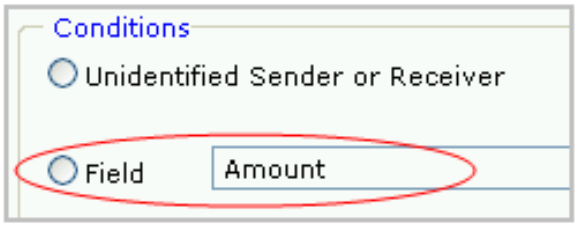


Customized message

The Notify section lets you specify a Subject and a customized Message for the alert mail. For example:



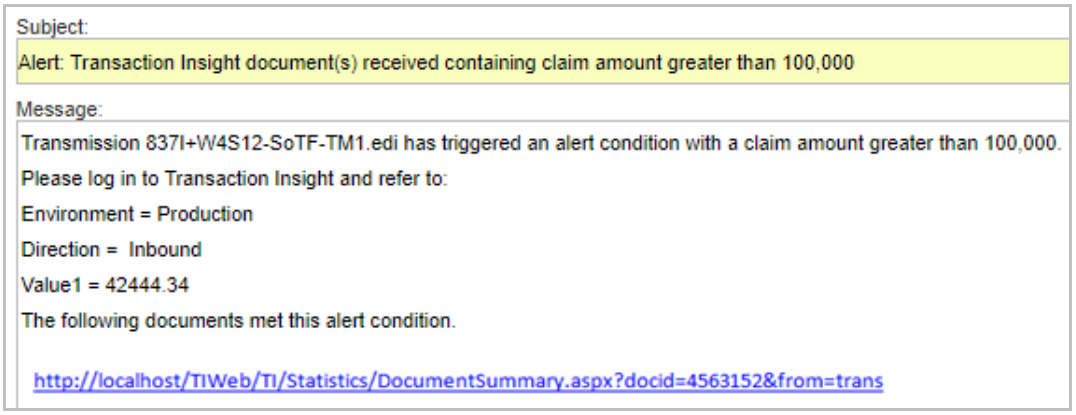
If the alert is for a Field condition, your customized message can include variable information that is specific to the file.



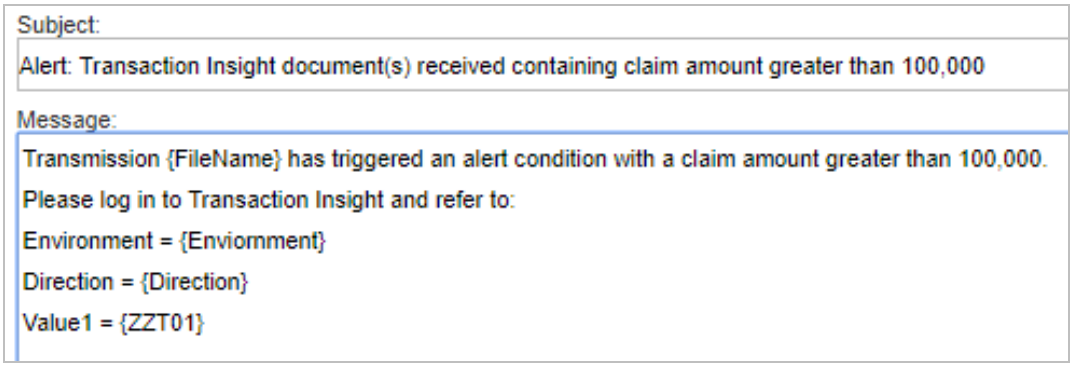
Variable names in curly brackets insert specific information about the file or from within the file that triggered the alert. The following variables can be used.

Variable	Value inserted in email
{Direction}	Inbound or Outbound
{Environment}	The environment in which the document was processed (Test or Production).
{FileName}	EDI file imported.
{ZZT01} to { ZZT99}	The values stored in specific Z-records for the document.

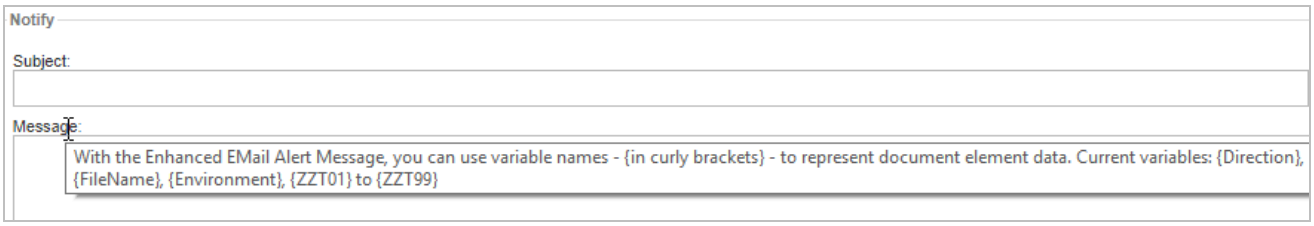
This example includes the filename, environment, direction, and Z-record specified for Value1. The link is automatically added to the bottom of the email.



The following text generated the email. Notice the variables in curly brackets.



There is fly-over help on the word **Message**:



Sender and recipients of email

The bottom of the Notify section lets you specify what email addresses and teams should be notified each time the alert is triggered. This is not affected by the email frequency setting for the username.

Select users to receive emails
Click one or more Users in System and use the arrows to move them to Users to Email. Be sure they are users who have email addresses in Transaction Insight.

Select teams to receive emails
All members of the team will receive the email if they have email addresses in Transaction Insight.

My Account

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

Details are in the **TIB_transactioninsight_*version*_usersguide.pdf**.

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

DRG Setup

Allow DRG Usage Page

The DRG (Diagnostic Related Group) pages are for Transaction Insight Healthcare Edition.

To allow users to see the DRG Usage page, choose these in Common Administration under **Settings | General settings**:

- Product Mode of Healthcare
- Page Settings of Display DRG Usage

Create Transaction Filters

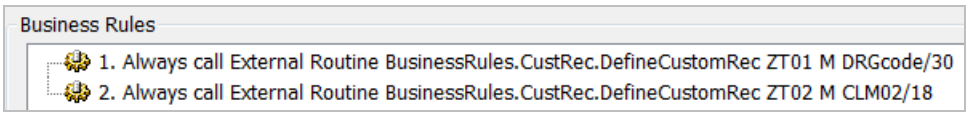
Add these transaction filters to Transaction Insight for each 837I guideline that you want to include:

- The DRG code from the HI-01-02 for Diagnostic Related Group (DRG) Information.
- The Monetary Amount from the CLM-02.

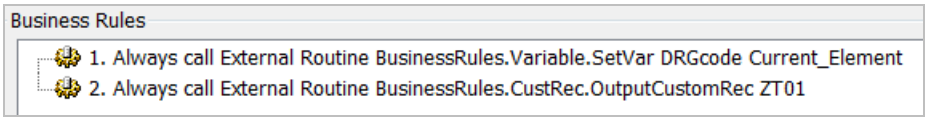
Example

This example sets up ZT01 and ZT02 records for the DRG Usage page.

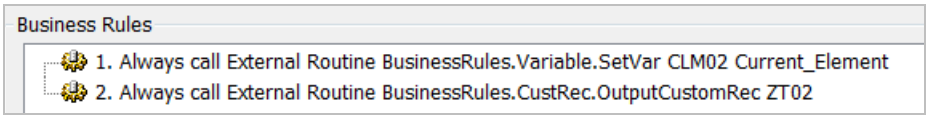
On the ST segment:



On the DRG HI_01_02:



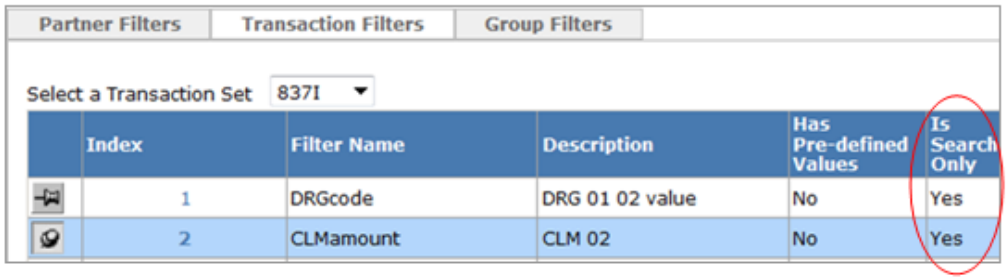
On the CLM02:



See **Filters_for_FPP.pdf**.

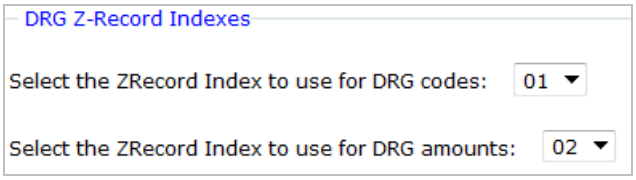
Set up DRG Filters in Portal

Under **Filters | Transaction Filters**, define the filters. For the Create Transaction Filters example on page 107, where the DRG code is ZT01 and the DRG amount is ZT02, this would be:

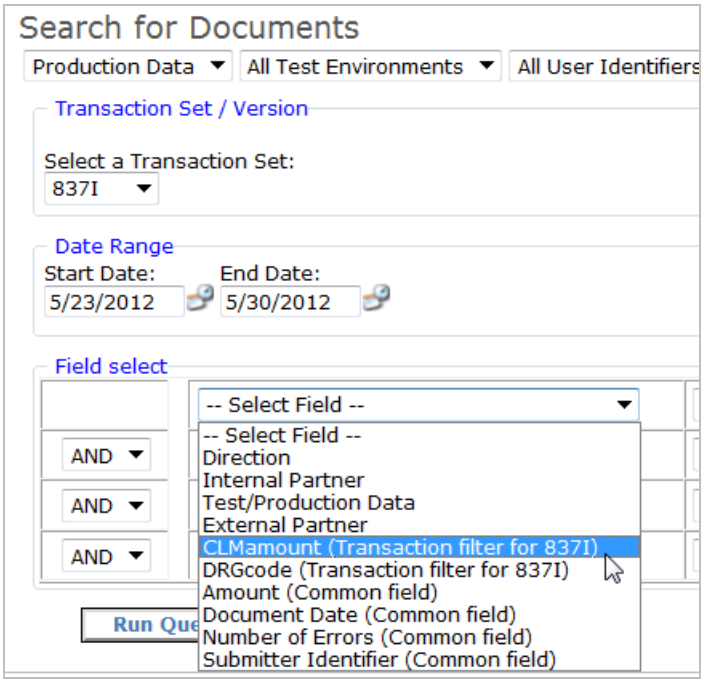


Important: Set both filters to Is Search Only = Yes

Under Settings | Document Fields, select the indexes you just used on the Transaction Filters page. For the Create Transaction Filters example on page 107, where the DRG code is ZT01 and the DRG amount is ZT02, this would be:

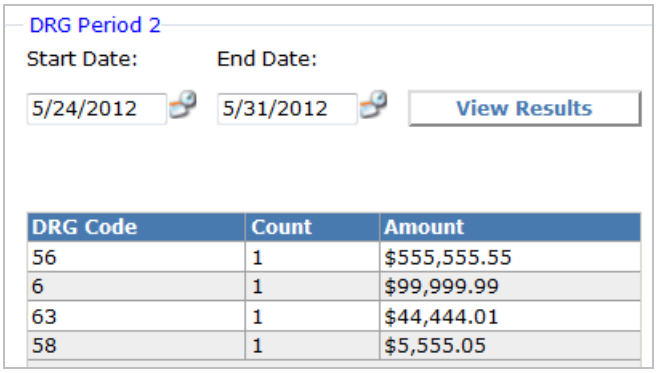


To see if the filters are set up, look for them under Search Documents:



Test the DRG Page

As new data is validated with the DRG transaction filter guidelines, and TIUtilities updates filters, the DRG Usage page will be populated:



DRG Code	Count	Amount
56	1	$555,555.55
6	1	$99,999.99
63	1	$44,444.01
58	1	$5,555.05

5 Managing Statistics, Tasks, and Files Pages

Overview of Transaction Insight Pages

The Transaction Insight pages under Statistics, Tasks, Search, and Files are for users, but the administrator is responsible for setting up these pages so that users have the information they need.

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

- Managing the Statistics Pages
- Managing the Tasks Pages
- Managing the Search Documents and Search Transmissions Page

Managing the Statistics Pages

Item	Where to Look for Information	Page Affected
Internal Partners External Partners	Set Partner Type under the **Partners** page. Use Edit or Add New Partner. See Partners page 40.	Documents Errors Document Volumes Success Rate Transmission Volumes Search Documents Search Transmissions
Partner Filters	Create or edit a partner filter under the **Filters** page. Control which partners are included in the partner filter under the **Partners** page. See Setting up Partner Filters page 56.	Documents Errors Document Volumes Success Rate Transmission Volumes Search Documents Search Transmissions
Partner Names	Change partner names under the **Partners** page. Edit the partner with the erroneous name. To correct the names of partners with names like [SENDER_3] or [RECEIVER_1], see Moving Data to the Correct Sender or Receiver on page 125.	Documents Errors Document Volumes Success Rate Transmission Volumes Search Documents Search Transmissions
Transaction Filters	Create transaction filters under **Filters | Transaction Filters**. Please see **Filters_for_FPP.pdf**.	Documents Document Volumes Success Rate Search Documents Search Transmissions
Can user X see this page?	Under **Users**, edit user *X* and note the Assigned Roles. Under **Roles**, edit the role and check its permissions.	Documents Errors Document Volumes Success Rate Transmission Volumes Search Documents Search Transmissions
Which partners' data can a user see?	Under Users, edit the user and note the Assigned Partner Groups. They must be in a group to see data. If they have All Partners, they can see all data. Adjust under **Partners | Partner Groups | Assign Partners**.	Documents Errors Document Volumes Success Rate Transmission Volumes Search Documents Search Transmissions

Item	Where to Look for Information	Page Affected
View or edit the data in a Form	Edit the user under the **Users** page and note their Assigned Role(s). See Maintaining Users on page 55. Edit the role under the **Roles** and check their Form View Level and Form Edit Level under the Permissions tab. 100 shows all form fields. This controls form viewing under the Transmission page. See Choosing Partners for a Partner Group on page 48 and Permissions for Forms on page 142. Now edit their team under the **Teams** page. If they have a role assigned to them with the proper permissions (see Permissions for Forms on page 142, they can view and/or edit forms under My Tasks. EDI data must be sent to Transaction Insight, along with detail files, to use forms.	Forms

Managing the Tasks Pages

Item	Where to Look for Information	Page Affected
Can user X see this page?	Under **Users**, edit user *X* and note the Assigned Roles. See Maintaining Users page 55. Under **Roles**, edit the role and check its permissions. If **Tasks** is checked, this user can access the page. See Choosing Partners for a Partner Group page 48.	My Tasks
What teams can user X see on this page?	Users can only see teams to which they belong. To add or remove a user from a team, edit the team and make adjustments in the Team Members area. See Setting up New Teams on page 65.	My Tasks
What tasks are assigned to a team?	The tasks are assigned to the team by routing rules. To check routing rules for a team, edit the team and look under Team Routing Rule. See Setting up New Teams on page 65.	My Tasks

Item	Where to Look for Information	Page Affected
Who is on the team and what can that particular member do?	To change the list of team members under **Teams**, edit the team and adjust the Team Members area. To specify what a team member can do under **Teams,** edit the team and assign them to a team role that has the desired permissions. See Teams on page 64.	My Tasks
List of statuses and priorities	To change the statuses or priorities, go to **Settings | Statuses/ Priorities**. See General Settings on page 77. To specify who can change a task's status or priority, edit the team and look at the Team Roles and Team Roles Assignment. See Teams page 64.	My Tasks
Assigning	To specify who can Assign, edit the team and edit each Role Name. See which ones have Assign Task. Go to Team Roles Assignment and see who has these team roles. See Teams page 64. To specify to whom they can Assign, edit the team and look at Team Members.	My Tasks
All other statuses	To specify who can use these, edit the team and look at the permissions for each role under Team Roles. See who has these roles under Team Roles Assignment. See Teams page 64. To specify other actions to appear on this list: - Go to **Teams | Team Roles** (for an individual team). See Teams page 64. - Go to **Settings | Template Roles** (for all teams). See Template Roles page 84.	My Tasks

Managing the Search Documents and Search Transmissions Pages

Item	Where to Look for Information
Can user X see this page?	Under **Users**, edit user *X* and note the Assigned Roles. Under **Roles**, edit the role and check its permissions. Admin role does not include the search page permission. Search must be selected separately.
Which partners' data can a user see?	Under **Users**, edit the user and note the Assigned Partner Groups. They must be in a group to see data. If they have All Partners, they can see all data. Adjust under **Partners | Partner Groups | Assign Partners**.
Select Field Entries	
Test/Production Data	Set by the ISA15 or Importer's **t** parameter.
Extended Fields	For HIPAA (Transaction Insight Healthcare edition only) and known types, Amount, Document Date, and Submitter Identifier are automatically flagged by Transaction Insight from the data; varies by transaction. See **Data_Types_and_TI.pdf**.
Transaction Filters	Vary by transaction. Create transaction filters under **Filters | Transaction Filters**. See **Filters_for_FPP.pdf**. When searching, a user must select at least one transaction filter.
External and Internal Partner Filters	Create or edit partner filters under the **Filters** page. Control which partners are included in the partner filter under the **Partners** page. See Setting up Partner Filters on page 56.

Managing the Files Pages

Item	Where to Look for Information	Page Affected
Can user X see this page?	Under **Users**, edit user *X* and note the Assigned Roles. See Setting up New Users page 52. Under **Roles**, edit the role and look at the permissions selected under **Files**.	Upload View
Where can user X upload or view?	Under **Users**, edit user *X* and note the Assigned Partner Group(s). Under **Partners | Partner Groups**, edit a partner and choose the folders tab.	Upload View

6 Appendix A - Using Custom Records to Identify Partner Data

Custom Records Overview

Transaction Insight has two ways to identify which partner is sending or receiving the EDI that it is processing:

- From values in the EDI enveloping (ISA05 and ISA06, for example). For details, see Identifying Partner Data on page 44.
- From values in the EDI at the location of your choice in the transaction set.

You mark these locations by adding business rules to the guideline that is to be used for validation. During validation, these business rules write a special custom record to the output. Transaction Insight uses the custom record to identify the sender or receiver.

This section explains how to do this.

Examples in this Section

The example that continues throughout this section shows how to have Transaction Insight identify claim senders by the data in the 2010AA NM109. When clearinghouses combine many providers in one interchange or transaction set, they can use the NM109 to identify specific providers.

Steps in Identifying Sender or Partner by Custom Record

The big steps in identifying a sender or a receiver from a custom record include:

Step	See …
1. Preparing a guideline that will create the proper custom ZTR*n* or ZTS*n* record.	Preparing the Guideline page 118
2. Merging that guideline with a HIPAA GuidelinePlus (Transaction Insight Healthcare edition only) or other guideline with DSR marks and adding the result to Instream.	Merging the Guideline page 121
3. Specifying which partners will have which values in this custom record.	Specifying Custom Record Values for Partners page 122
4. Using Instream to validate with the guideline containing the custom record.	Validating and Sending the Detail File page 123
5. Sending the data and detail file containing the custom record to Transaction Insight.	Validating and Sending the Detail File page 123

Preparing the Guideline

Prepare a guideline that will generate one or more custom records containing the information that distinguishes one partner from another.

This is a job for someone who can create business rules in EDISIM Standards Editor. Please see the Custom Records chapter of **BusinessRules.pdf**, provided with Instream.

The ID of the record that you define can be:

- ZTR0 through ZTR9 to identify a receiver
- ZTS0 through ZTS9 to identify a sender

This rule will write the record to the detail file during validation. An additional Z is automatically added to the front of the record's ID, so that the record ZTR0 will appear as ZZTR0 in the detail file.

Example

Our goal is to get a custom record like this into the detail file:

ZZTR0 12123456789

Line number of NM1 from EDI file

ZZTR0 12123456789

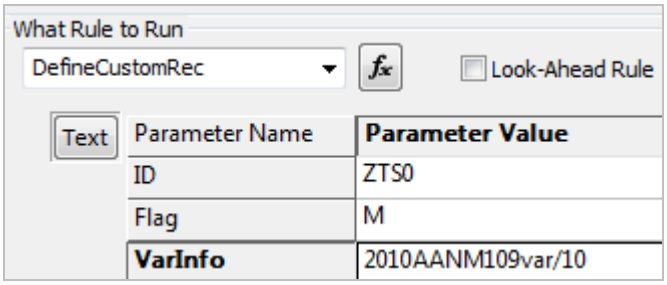
Record ID (constant) *Value from NM109 (different for each partner)*

The record contains the provider's ID from the 2010AA NM109. The **12** before the value is the line number of the NM1 segment in the EDI file.

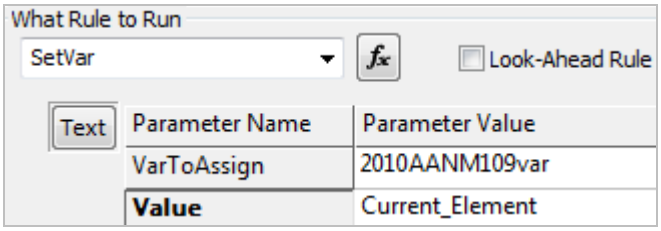
Creating the Guideline

1. Open EDISIM Standards Editor and create a new guideline based on 837-X223 (an institutional health care claim 5010 addenda), the same version as the guideline that we will use for validation.

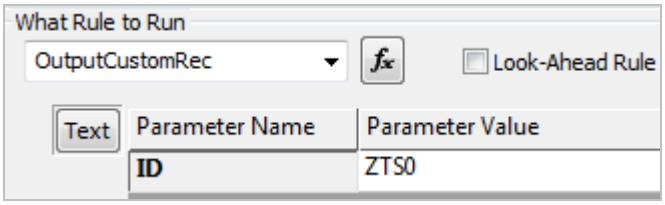
2. Create a business rule on the ST segment that defines custom record ZTS0.



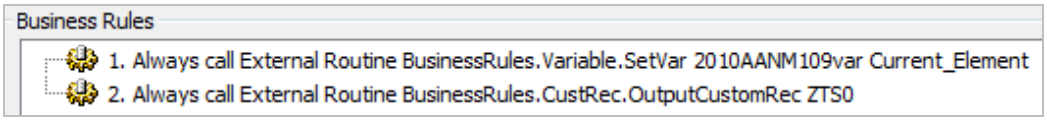
3. Set up variable **2010AANM109var** on the 2010AA NM109.



4. Create a business rule on the 2010AA NM109 that writes the ZTS0 record.



The 2010AA NM109 now has these two business rules, in this order:



5. Save the guideline as **837IS**.

Testing the Guideline

1. Copy 837IS.std from EDISIM's **User Files\Public Guidelines** directory to Instream's **Database** directory.

2. Validate some addenda 837I data that contains an EIN number in the 2010AA NM109.

   You can use **837I_5010_H_ErrorEvenClms.txt** in Instream's **DemoData** directory, which has this NM1 segment for 2010AA:

   ```
   NM1*85*2*JONES*****XX*2541214583~
   ```

3. Check the detail file for a ZZTS0 record, like this:

   ```
   ZZTS0          92541214583
   ```

   Note the additional Z before the record's ID. In this example, the provider's ID is `2541214583`. It is in the file's 9th segment.

4. If the detail file includes a ZZTS0 record with the NM1-09 value in the detail file, you can assume that your business rules are working.

The next step is to merge the guideline as described in Merging the Guideline.

Merging the Guideline

If you are adding the custom record to a HIPAA guideline, merge the guideline you created with Standards Editor with the corresponding GuidelinePlus. (Transaction Insight Healthcare edition only.)

Otherwise, merge with a PDSAGM guideline or another one that has DSR marks for the ISA, GS, and ST segments, or add DSR marks to the guideline that has the ZT-record rules. See Creating Guidelines for Instream in **TIB_fsp_edisim_*version*_fseditor.pdf** provided with EDISIM's documentation.

Review **Data_Types_in_TI.pdf** for other requirements for the data type you are using.

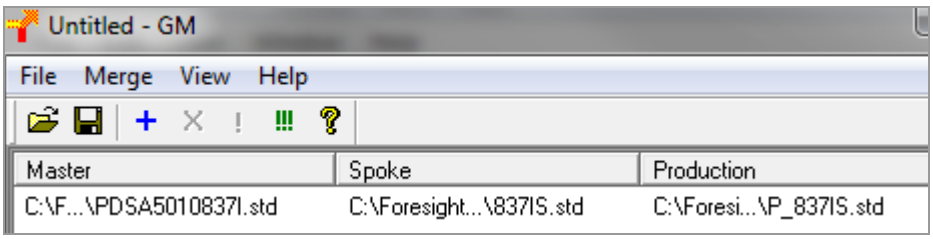
For details about merging, see **GuideMerge.pdf**.

Give the resulting guideline (.STD file) to the Instream system administrator for use during validation.

Example

Our goal is to merge our newly created EDISIM guideline 837IS into the corresponding GuidelinePlus PDSA5010837I.

1. Open 837IS with Standards Editor.
2. Click the GuideMerge toolbar button .
3. Click the plus sign toolbar button .
4. Set up the dialog box to merge:
   a. Master: The TIBCO Foresight guideline PDSA5010837I.std from Instream's Database directory.
   b. Spoke: The user guideline 837IS.std.
   c. Production: A new guideline P_837IS.std in Instream's Database directory.



   d. Click the Merge All toolbar button .
5. If there are no merge errors, test the new Instream guideline **P_837IS** with a 5010 837I addenda EDI file such as **837I_5010_H_ErrorEvenClms.txt** in Instream's DemoData directory.

6. Check the detail file for a ZZTS0 record.

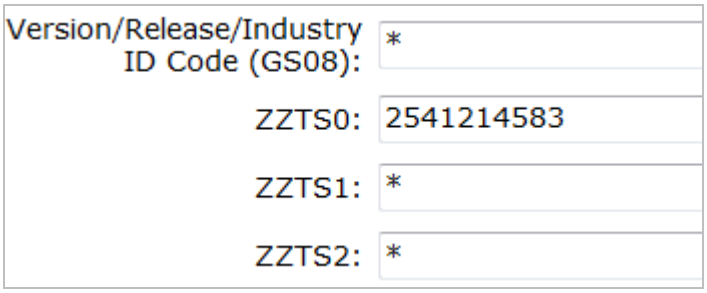
Does the guideline generate custom records containing the information that distinguishes one partner from another? If so, you can now use it when setting up partners in Transaction Insight. See Specifying Custom Record Values for Partners on page 122.

Specifying Custom Record Values for Partners

After creating a guideline that generates custom records with distinguishing information, you can use the record when defining new partners. Previously defined partners will not be included.

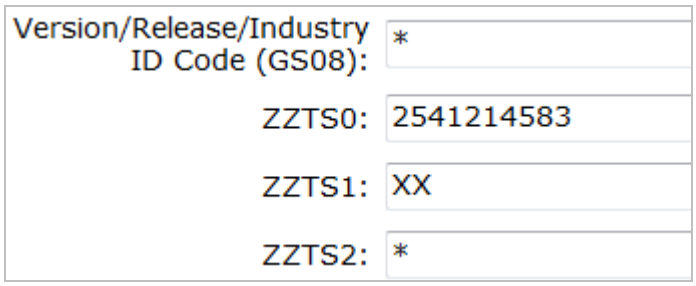
1. Go to Common Administration.
2. Add the partner. See page 40.
3. From the Partners page, go the Senders or Receivers tab – depending on whether the value will be in the data that the partner sends or receives.
4. Click **Add New Sender Data** or **Add New Receiver Data** and pick the standard and then the partner.
5. Find the field for the custom record that you added in the business rules. It will have an additional Z in front of the ID.

Example:



6. Type the value that will be in this custom record for this partner.

   You may use multiple custom records to help identify this partner. For data to be identified as belonging to this partner, values that you enter here must ALL be present in the data. In this example, ZZTR0 must contain 2541214583 and ZZTR1 must contain XX:



7. Save.

8. If there is another way to identify this partner, click **Add New Sender Data** or **Add New Receiver Data** again, select the same partner, and add the other values that identify the partner. You can include any number of alternate ways to identify the partner.

Validating and Sending the Detail File

You have created a guideline that generates the proper custom record, and set up a partner that uses that custom record.

You can now use that guideline to validate that partner's data with Instream and send the data and detail file to Transaction Insight. The data should be assigned to the correct partner.

7 Appendix B - Partner Assignment Errors

Partner Assignment Error Causes

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

- The data matches no partners, so Transaction Insight made up a new partner. See If the Correct Partner does not Exist in Transaction Insight on page 126.
- The data matches two or more partners, and is assigned to one of them but not necessarily to the one that matches most closely.
- The data matches only one partner, but it is not the one you wanted it to match.

Moving Data to the Correct Sender or Receiver

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

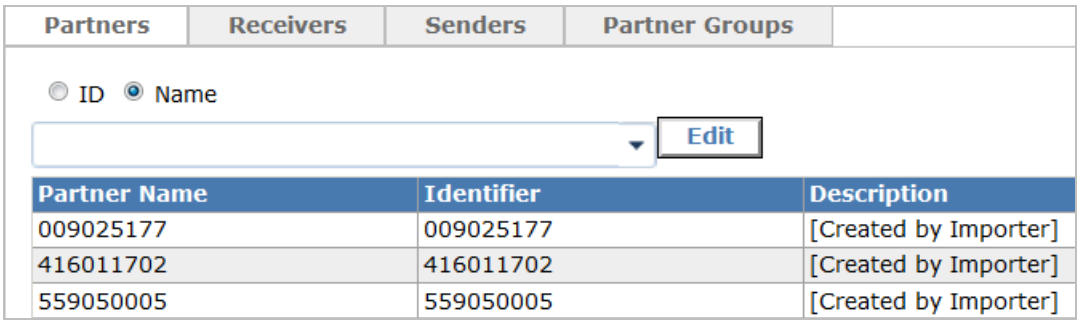
You can move *all* data from one partner to another, but you cannot pick out individual documents to move.

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

If the Correct Partner does not Exist in Transaction Insight

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

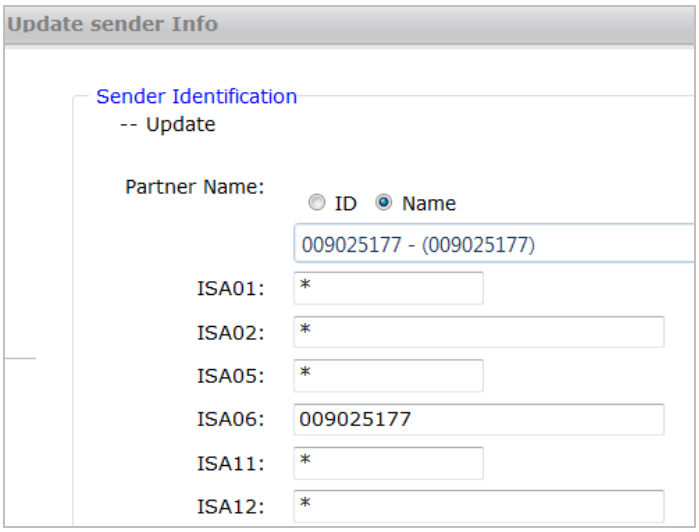
When Transaction Insight sees data that it cannot identify as belonging to a partner, it never guesses. Instead, it makes up a new partner with a description that says [Created by Importer]:



The partner's name and Identifier will be either the ISA06 (if the unidentified partner is a sender), or the ISA08 (if it is a receiver).

In addition, the partner is added to the **Partners | Senders** tab or the **Partners | Receivers** tab, with the following data:

- The ISA06 or ISA08
- The ZZTS9 or ZZTR9, if sent.



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

To fix:

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

   You may need to check the **Senders** or **Receivers** tab to determine the identity of this partner.

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

3. Click Save Changes.

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

4. Go to the Senders or Receivers tab and check the values in the new partner's route as described in Identifying Partner Data on page 44.

Moving Data to a Partner that already exists

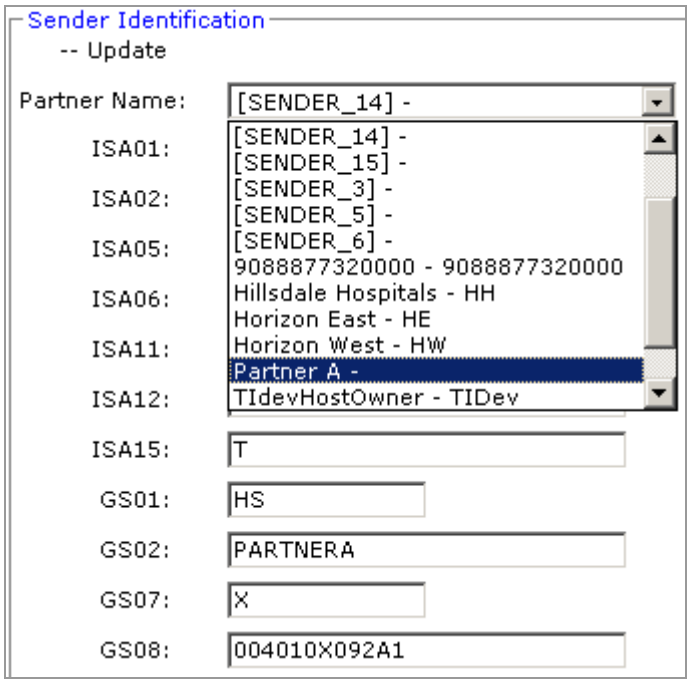
You can move data to a different partner:

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

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

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

   Example:



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

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

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

Checking the Values that Identify the Correct Partner

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

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

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

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

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

Checking Moved Data

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

To see the results of the move:

1. Under **Settings | Event Log**, choose Informational.
2. Look in the Description column for Sender identification updated or Receiver identification updated.
3. When that appears, the database has been updated and you can delete the unwanted partner that used to have the data.

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

Deleting Unwanted Partners

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

After an informational message in the Event log indicates that data has moved from the wrong partner to the right one (see Checking Moved Data on page 129), you can you can delete the unwanted partner:

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

Diagnosing Partner Assignment Errors

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

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

- Check the Sender and Receiver tabs for the partner that got the data.

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

- Check the partner that should have gotten the data.

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

- Check the data itself to see if it contains the correct identifying information

When Transaction Insight finds a partner that matches:

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

Tips:

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

  This includes a sender and receiver for all internal partners.

8 Appendix C - Permissions

Portal Permissions

To control which applications display on the portal:

- Per company: TIUtilities records which applications are licensed to appear in the portal.
- Per server: These Web.config settings for each server let you specify whether the portal will appear, and which applications it will contain:
  - DisplayCommonAdministrationPortal
  - DisplayTransactionInsightPortal
  - DisplayArchivePortal
  - DisplayOperationalMonitorPortal
- Per user: The permissions on the roles they have been assigned under Common Administration. Permissions are not available for selection under roles if they are not enabled in web.config or if they are not licensed. See User Permissions on page 131.

User Permissions

All users of portal applications get access to My Account. Other permissions have to be granted through Roles. You will see some or all of these choices, depending on:

- What applications are installed
- What your license permits
- Settings in Web.config
- What permissions your current user has

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

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

Admin Permission

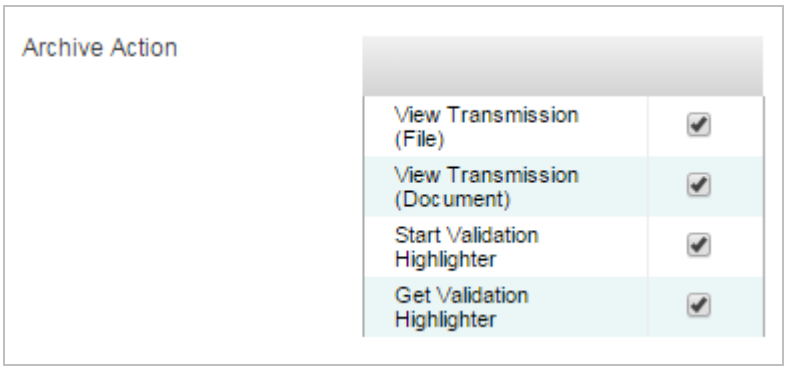
Applications Affected Common Administration

Usually granted to Portal administrators

Effect	
Read	Allows access to all pages under Common Administration.

Archive Action Permissions

Keep in mind that those with Archive Action Permissions can see any archived data for any partner.



Archive Action permissions must be combined with an Archive User permission.

Applications Affected Foresight Archive and Retrieval System

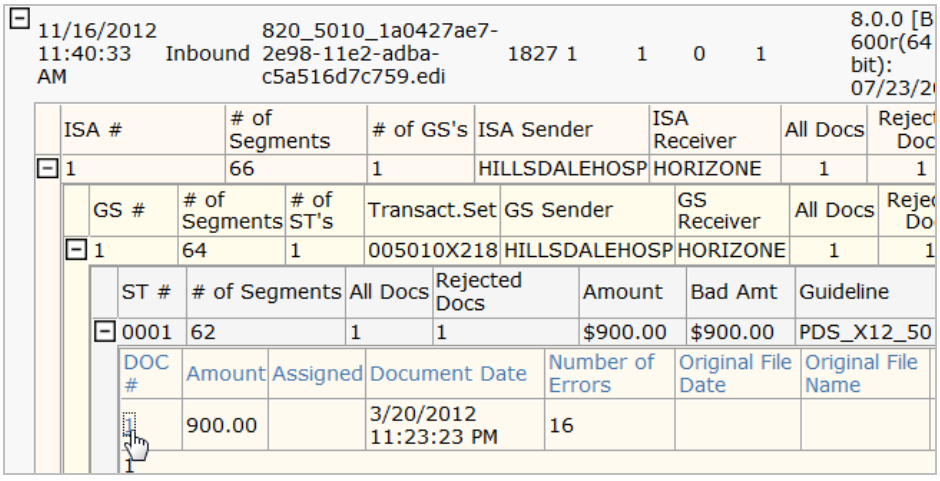
Usually granted to Foresight Archive and Retrieval System users and administrators

Effect - View Transmission (File)

Transmission view is not available for EDIFACT data.

Allows the user to view the Transmissions page by selecting from a list of all documents in a file. Each document is available in a table from which the user chooses.

Request Date	User	ActionName	Target	Status	Results
11/16/2012 11:16:29 AM	TutorialAdmin	View Transmission (File)	820_5010_1.edi	Complete	View Results
11/16/2012 11:03:58 AM	TutorialAdmin	View Transmission (File)	4010_214_2.edi	Complete	View Results



11/16/2012 11:40:33 AM	Inbound	820_5010_1a0427ae7-2e98-11e2-adba-c5a516d7c759.edi	1827	1	1	0	1	8.0.0 [B 600r(64 bit): 07/23/2

ISA #	# of Segments	# of GS's	ISA Sender	ISA Receiver	All Docs	Reject Doc
1	66	1	HILLSDALEHOSP	HORIZONE	1	1

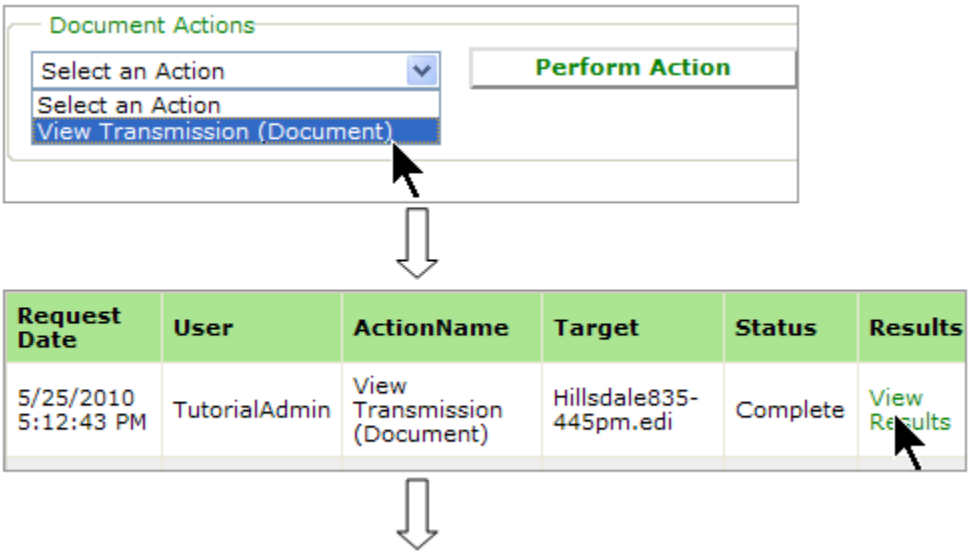
GS #	# of Segments	# of ST's	Transact.Set	GS Sender	GS Receiver	All Docs	Reje Do
1	64	1	005010X218	HILLSDALEHOSP	HORIZONE	1	1

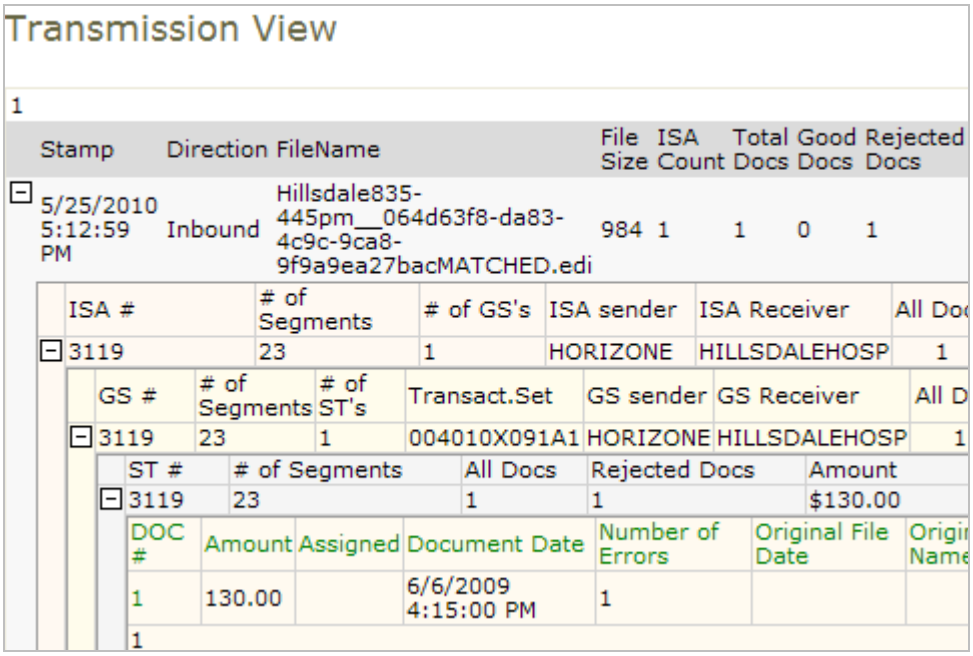
ST #	# of Segments	All Docs	Rejected Docs	Amount	Bad Amt	Guideline
0001	62	1	1	$900.00	$900.00	PDS_X12_50

DOC #	Amount	Assigned	Document Date	Number of Errors	Original File Date	Original File Name
1	900.00		3/20/2012 11:23:23 PM	16		

Effect - View Transmission (Document)

Allows the user to view the Transmissions page by selecting a single document in a file.

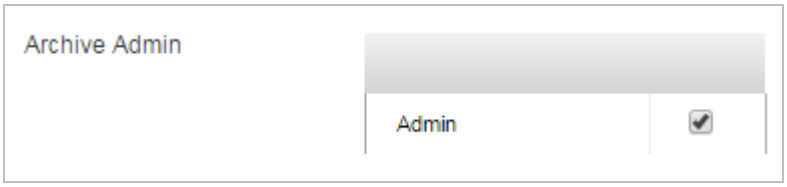




Effect – Start Validation Highlighter and Get Validation Highlighter

Allows the user to see the Validation Highlighter view, which lets you see an HTML report of the validation results for EDIFACT data.

Archive Admin Permission



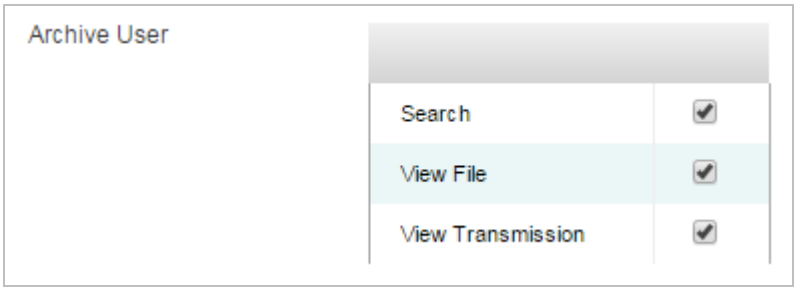
Applications Affected Foresight Archive and Retrieval System

Usually granted to Foresight Archive and Retrieval System administrators

Effect	
Admin	Allows access to Foresight Archive and Retrieval System's Admin page.

Archive User Permissions

Keep in mind that those with Archive User Permissions can see any archived data for any partner.



Applications Affected Foresight Archive and Retrieval System

Usually granted to Foresight Archive and Retrieval System users

Effect	
Search	Allows access to these Foresight Archive and Retrieval System pages, where they can conduct basic searches, and see the basic charts under Action and Pending pages.

View File Allows the same access as Search, plus access to the **View** link for files on the Action page, which displays the actual file contents.

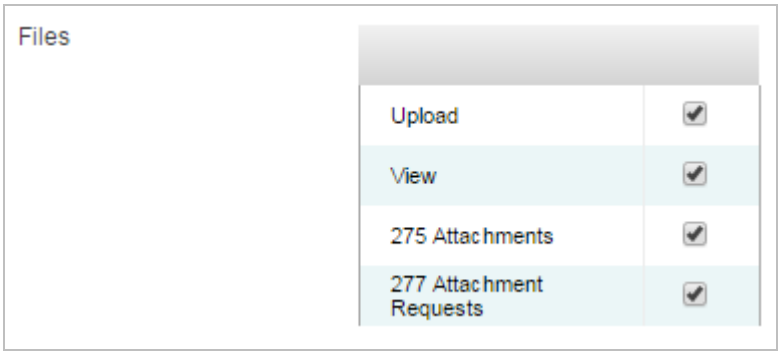
Name	Size	Scope	Date	Imported By	View
4010_214_2.edi	449 bytes	PRIMARY	11/9/2012 4:22 PM		View

View Transmission

Allows access to the **View Results** link for files on the Pending page, which displays the Transmission view for the file and all documents that it contains.

Request Date	User	ActionName	Target	Status	Results
11/16/2012 1:40:03 PM	Rita O'Neill	View Transmission (File)	4010_214_10.edi	Complete	View Results

Files Permissions



Applications Affected Transaction Insight

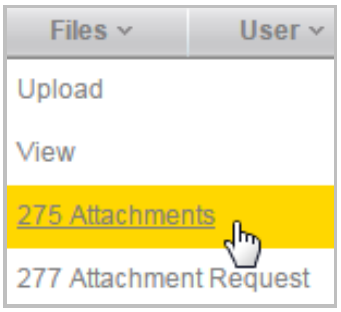
Usually granted to Users who upload or view files on the FPP server.

Effect

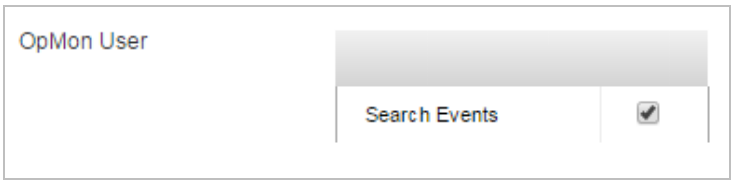
Upload Allows access to the Upload page, where users can upload files to specified directories on the web server if their partner group has upload folders set up.

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

275 Attachments (If present)



OpMon User Permission



OpMon User Search Events permission gives access to Foresight Operational Monitor.

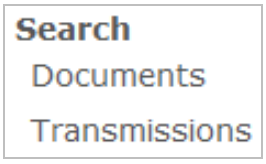
Search Permission

Applications Affected Transaction Insight

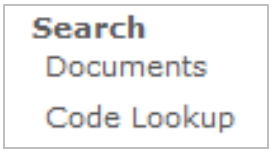
Usually granted to Selected support staff and trading partners

Effect

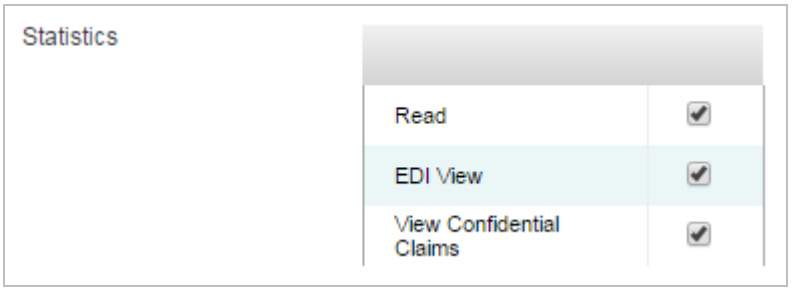
Documents Allows access to the Search Documents pages:



Code Lookup Allows access to the Code Lookup page for HIPAA portals (Transaction Insight Healthcare edition only).



Statistics Permissions

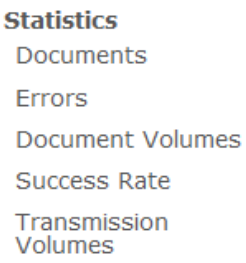


Applications Affected Transaction Insight

Usually granted to Transaction Insight users and administrators

Effect

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



EDI View Allows user to view the actual data.

If you use confidentiality, keep in mind that the data for confidential fields is not concealed in EDI view. See Permissions for Forms on page 142.

View Confidential Claims

Allows user to see identifying information about people whose identifiers are flagged as confidential. See Managing Confidentiality in Transaction Insight in **TI_Reference_Manual.pdf**.

Tasks Permission

Applications Affected Transaction Insight

Usually granted to Team members responsible for correcting data

Effect

Read	Allows team members to access pages under the Tasks label on the left menu.

Form View and Form Edit Permissions

Applications Affected

Transaction Insight and Foresight Archive and Retrieval System

Usually granted to Transaction Insight users who view forms through the Transmissions or correct data through the My Tasks pages. Foresight Archive and Retrieval System users who view data in forms.

These settings do not affect what data is displayed in EDI view.

Effect

Form View Level	Allows access to fields with view levels up to the number specified. Applies to Transaction Insight and Foresight Archive and Retrieval System HIPAA forms (Transaction Insight Healthcare edition only), Errors Not In Form, and Structured EDI view. 100 = user can see all fields on a form. See Permissions for Forms on page 142.
Form Edit Level	Allows access to fields with levels up to the number specified, when editing forms through the My Tasks pages in Transaction Insight.

Applies to Transaction Insight HIPAA forms (Transaction Insight Healthcare edition only) and Errors Not in Form.

This setting does not affect Foresight Archive and Retrieval System, since users cannot edit forms there.

100 = user can edit all fields on a form.

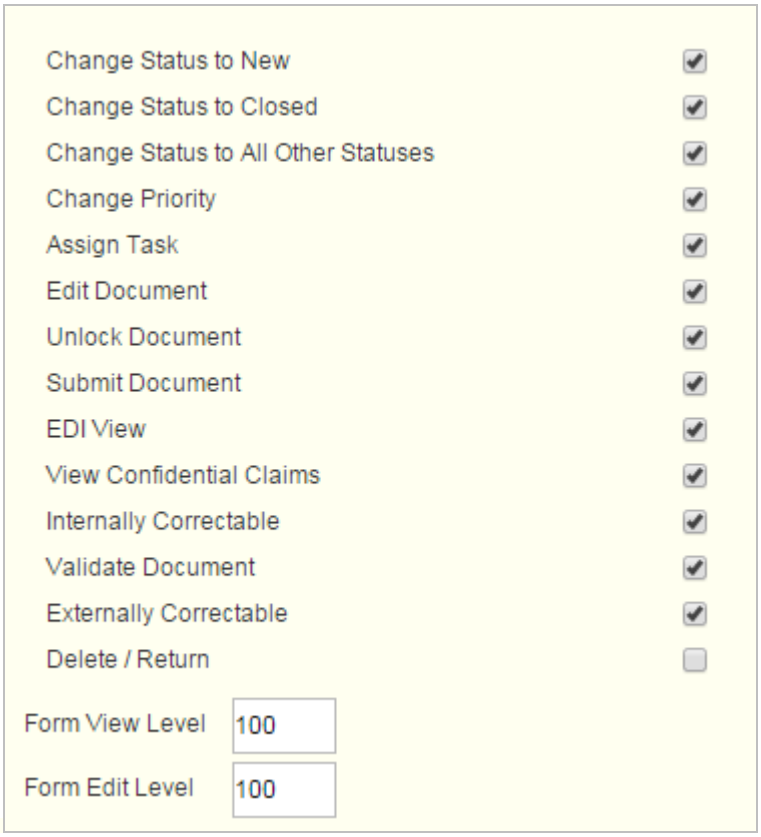
See Permissions for Forms on page 142.

Team Role Permissions

You will assign each Transaction Insight team member one or more team roles. You can define team roles in two places:

Teams Affected	Page	For more information
An individual team	**Teams |** *Edit a team* **Teams	Add new team**	See Team Roles on page 67
All teams	**Settings	Template Roles**	See Template Roles on page 84

In either location, you have a list of role permissions from which to choose.

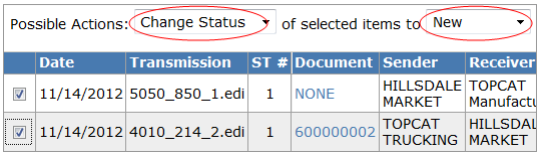
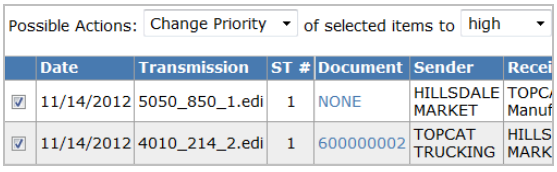
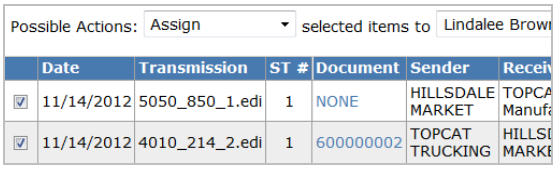


These are described below.

Roles for users also have permissions. See Roles on page 51.

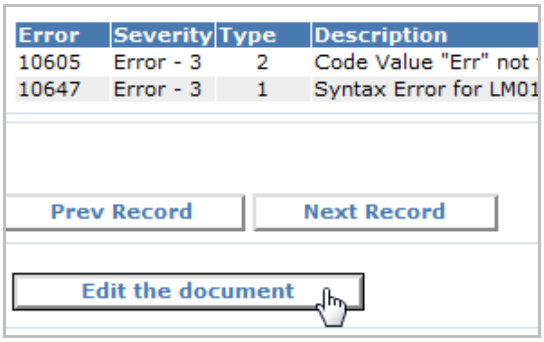
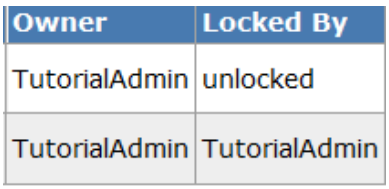
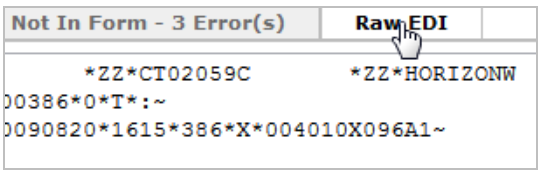
Permissions for Team Documents

The following permissions affect all documents under My Tasks.

Role	Description	Example
Change Status to New	Team members with this role will be able to select **Change Status** under **Possible Actions** and then choose **New**.	
Change Status to Closed	Team members with this role will be able to select Change Status under Possible Actions and then choose **Closed**.	
Change Status to All Other Statuses	Team members with this role will be able to select Change Status under Possible Actions and then choose any other status except: ▪ New ▪ Closed ▪ System statuses like Submitted, Submitting, Validated, Validating, etc.	
Change Priority	Team members with this role will be able to select Change Priority under Possible Actions and then choose any priority defined for the team.	
Assign Task	Team members with this role will be able to reassign items in the task list to another team member. They can choose **Assign** under Possible Actions and then choose a team member. A team member receiving an assignment will get an e-mail if they have a valid e-mail address and e-mail is enabled under Users (see Users on page 52).	

Permissions for Forms

The following permissions affect documents that have forms. These are documents for which the detail results file and the EDI data itself have been imported into Transaction Insight.

Permission	Description	Example
Edit Document	Team members with this role can edit document data in a form. To edit the form, they can go to My Tasks, click the link in the Document column, and then choose Edit the Document.	
Unlock Document	Team members with this role can unlock documents that are locked because someone is editing them, or because someone previously edited them and navigated away without taking some action like canceling or saving. The Locked By column will show a username if the document is locked: To unlock, they will select the document and choose **Possible Actions | Unlock** or edit the document and then click Cancel.	
Submit Document	Team members with this role can validate and then submit forms after they have edited them. They will need Edit permission as well. The Validate and Submit buttons are under Form Actions at the bottom of the form. See **TIB_transactioninsight_*version*_usersguide.pdf** for more details.	
EDI View	Team members with this role can view EDI by using the **Raw EDI** tab at the top of a form they are viewing or editing. EDI view is disabled for forms that have data flagged as confidential, unless the user has access to confidential information. Raw EDI is not disguised by confidentiality or form view/edit levels.	

Permission	Description	Example
View Confidential Claims	Team members with this role can see confidential information on forms, if that feature has been implemented. See Managing Confidentiality in Transaction Insight in **TI_Reference_Manual.pdf**.	
Internally Correctable	Team members with this role can edit tasks that have errors designated as Internally Correctable under **Settings | Error Settings**. See Error Settings on page 87.	
Validate Document	Team members with this role can validate documents after correcting and saving them.	Without this permission, they will see this message when they attempt to validate: “You are not permitted to validate this document.”
Externally Correctable	Team members with this role can edit tasks that have errors designated as Externally Correctable under **Settings | Error Settings**. See Error Settings on page 87.	
Delete / Return	Use only when advised to do so by TIBCO Foresight.	
Form View Level	Team members with a Form View Level of 100 can view all data on a HIPAA form (Transaction Insight Healthcare edition only), Errors Not In Form, or Structured EDI View. Those with other levels can see the data in fields with view levels up to and including that number. For a list of fields and their form view levels, see Controlling a User’s Access to Form, Paged Form, and Errors Not in Form Fields on page 154.	A level of 65 would let the team member see data in fields that have form view levels of 1-65. Other fields will show asterisks instead of the field data.
Form Edit Level	Team members with a Form Edit Level of 100 can edit all data on a HIPAA form (Transaction Insight Healthcare edition only) or Errors Not In Form page. Those with other levels can edit the data in form fields with levels up to and including that number. For a list of fields and their form edit levels, see Warnings on HIPAA Forms and Errors Not In Form on page 153.	A level of 65 would let the team member edit data in fields with form edit levels 1-65. Other fields will show the data but it cannot be edited. This requires Edit permission as well. Field numbers are listed in Portal Permissions on page 131.

9 Appendix D - Administrator's Guide to Forms and Views

EDI Viewing Formats

Users can view documents via a link from the Document Summary page and X12 data can be edited via a button on the My Tasks page.

The Document Summary page provides a link to view the EDI contained within a document. This is a static view of the EDI; no editing is available from the Document Summary page.

- For X12 data, the link says "Click here to View the document."
- For EDIFACT data, the link says "Click here to View the document in Foresight Archive and Retrieval System."

The My Tasks page provides buttons to edit or view the EDI for a document (X12 only).

Configuration

The viewing format in which EDI is presented is configured within Transaction Insight based on the standard, version, and type of transaction being viewed. You cannot make changes to the default specifications with Common Administration tools. If changes are required, contact TIBCO Foresight Technical Support.

Note:

- Any transaction that does not have a viewing format explicitly specified by the default configuration is presented in Paged Form view.

  Example: The HIPAA X12 850 transaction is not specified in default configuration. Therefore all 850 transactions are presented in Paged Form view.

- All transactions are viewable with Raw EDI View.

Standard	Transaction Type	Version	Default Viewing Format(s)
EDIFACT	All	All	Structured EDI
HIPAA X12	270	4010A	▪ Form
		5010	▪ Structured EDI
	271	4010A	▪ Form
		5010	▪ Structured EDI
	276	4010A	▪ Form
		5010	▪ Structured EDI
	277	4010A	▪ Form
		5010	▪ Structured EDI
	278RP	4010A	▪ Form
		5010	▪ Structured EDI
	278RQ	4010A	▪ Form
		5010	▪ Structured EDI
	834	4010A	▪ Form
		5010	▪ Structured EDI
	835	4010A	▪ Form
		5010	▪ Structured EDI
	837D	4010A	▪ Form
		5010	▪ Structured EDI
	837DP	4010A	▪ Form
		5010	▪ Structured EDI
	837I	4010A	▪ Form

Standard	Transaction Type	Version	Default Viewing Format(s)
		5010	▪ Structured EDI
	837IP	4010A	▪ Form
		5010	▪ Structured EDI
	837P	4010A	▪ Form
		5010	▪ Structured EDI
	837PP	4010A	▪ Form
		5010	▪ Structured EDI

Accessing and Editing Information

Access varies depending on the type of data, X12 or EDIFACT.

X12 data:

- is available when data and validation detail results are submitted to Transaction Insight
- is viewed through Transaction Insight
- shows warnings and/or errors
- is editable in certain views when accessed via the My Tasks page.

EDIFACT data:

- is available when data and validation detail results are submitted to both Transaction Insight and Foresight Archive and Retrieval System
- is viewed through Foresight Archive and Retrieval System
- does not show warnings and/or errors
- is not editable.

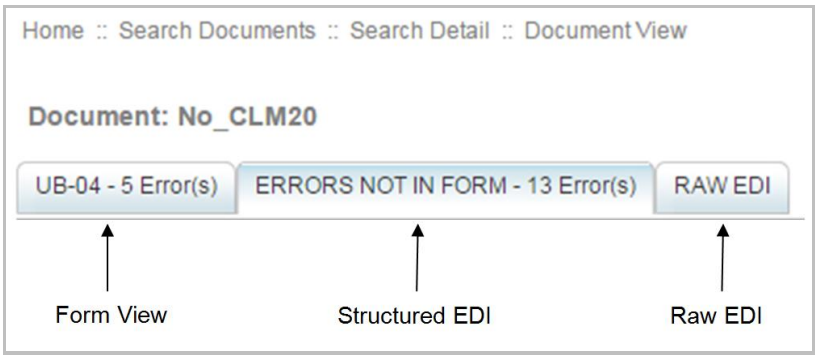
Tabs

When viewing EDI, up to four viewing formats are provided. Use the tabs to select different views.

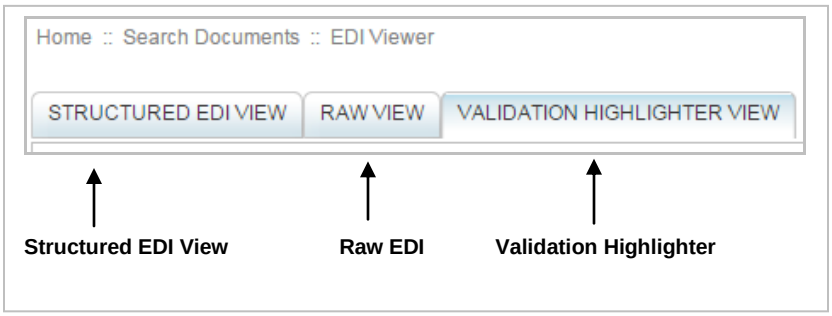
The available tabs and tab labels differ depending on the type of transaction being viewed, however the tab view order remains the same (from left to right):

1. Form or Paged Form View
2. Structured EDI/Errors not in Form
3. Raw EDI
4. Validation Highlighter

X12 Example

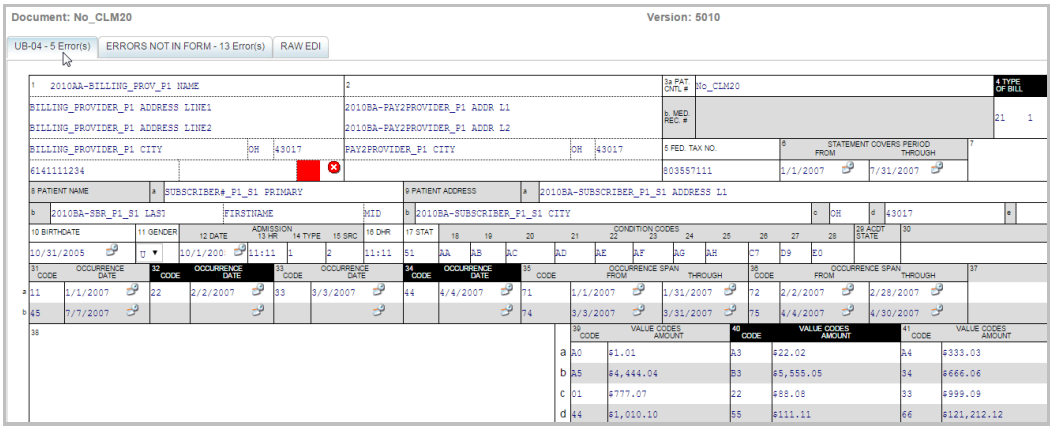


EDIFACT Example



Form View

Form View presents the EDI in an easy-to-read format based on the appearance of a manual (paper) transaction, such as a healthcare claim form. **Note:** This view is available for X12 data only.



Users can reach the Form View if:

- data is X12
- data and validation detail results were submitted to Transaction Insight
- You have assigned them appropriate permissions including access control levels to fields.

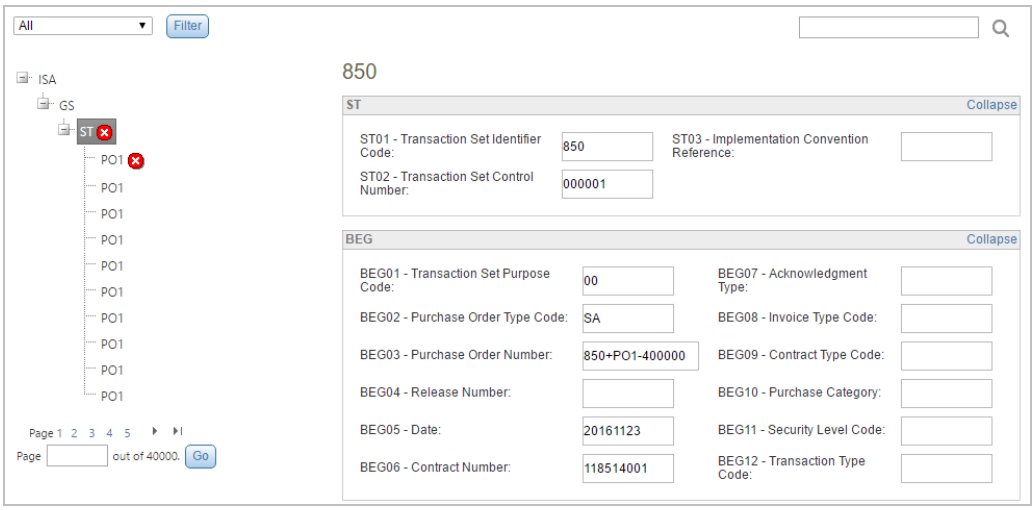
Paged Form View

Paged Form View presents X12 EDI in a human-readable format based on the structure of the EDI. It provides specialized controls such as paging, searching, and filtering that allow for faster access to data in the case of very large documents.

Users can reach the Form View if:

- data and validation detail results were submitted to Transaction Insight
- you have assigned them appropriate permissions including partner group, roles, and access control to fields.

Example:



Structured EDI View

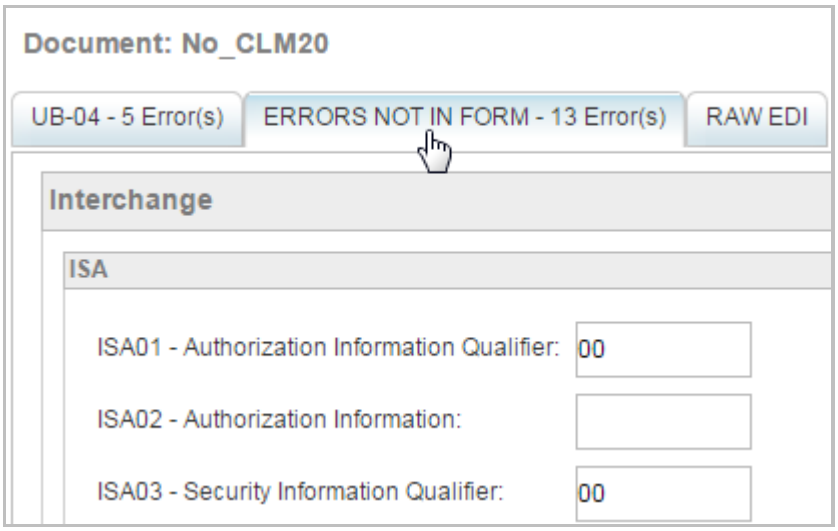
Structured EDI View presents the EDI in a human-readable format based on the structure of the EDI. Structured EDI View differs between X12 and EDIFACT data.

- See Structured EDI View for X12 Data on page 150.
- See Structured EDI View for EDIFACT Data on page 150.

Note: This view is also referred to as **Errors Not in Form**.

Structured EDI View for X12 Data

Structured EDI View presents X12 EDI in a human-readable format based on the structure of the EDI.

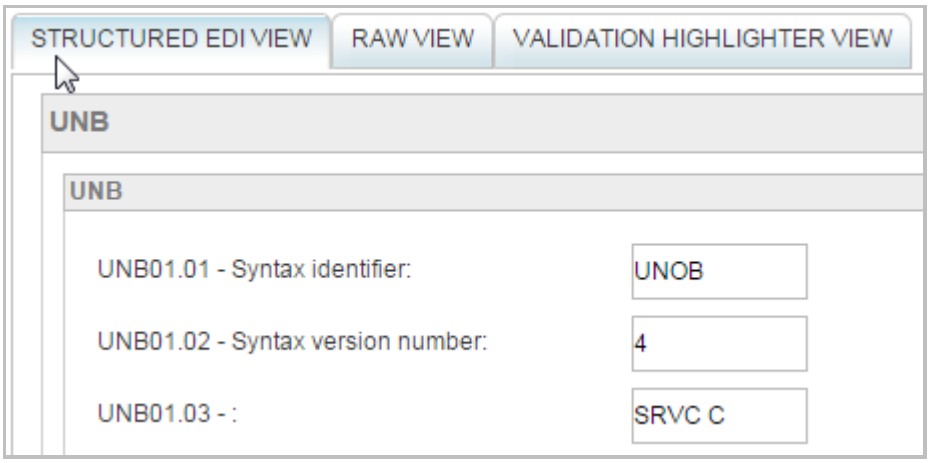


Users can reach the Structured EDI View for X12 data if:

- data and validation detail results were submitted to Transaction Insight
- errors were found or the data was imported with Importer's savegooddata option
- you have set TurnOnAllErrorsNotInForm to true in the Transaction Insight Web.config file
- you have assigned them appropriate permissions including access control levels to fields.

Structured EDI View for EDIFACT Data

Structured EDI View presents EDIFACT EDI in a human-readable format based on the structure of the EDI. It is accessed through the Foresight Archive and Retrieval System database and does not display warnings or errors. To see errors the Validation Highlighter View should be used. See Validation Highlighter View on page 152.



Users can reach the Structured EDI View for EDIFACT data if:

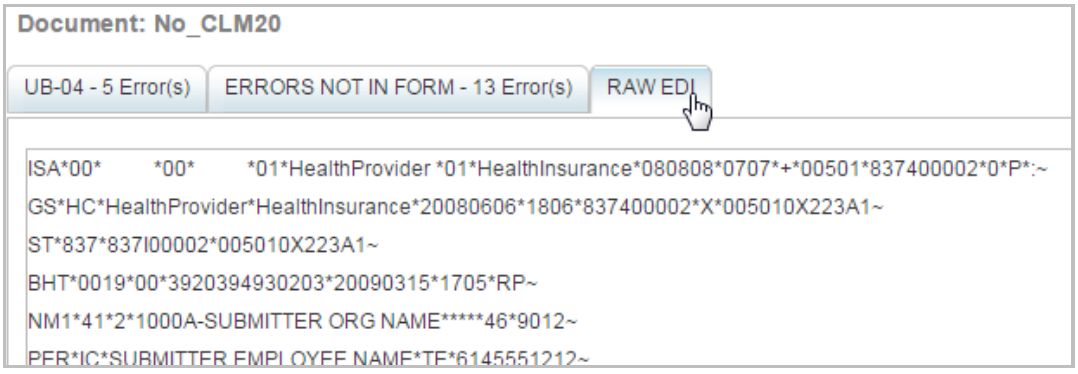
- data is EDIFACT
- data and validation detail results were submitted to Transaction Insight and Foresight Archive and Retrieval System
- the Archiver_UI_Importer workflow is running
- you have assigned them appropriate permissions.

Raw EDI View

Raw EDI View presents the raw electronic data with no additional formatting.

Warnings and errors are not shown in this view. To view warnings and/or errors:

- for X12, use the Form View or Structured EDI View for X12 Data
- for EDIFACT, use the Validation Highlighter View.



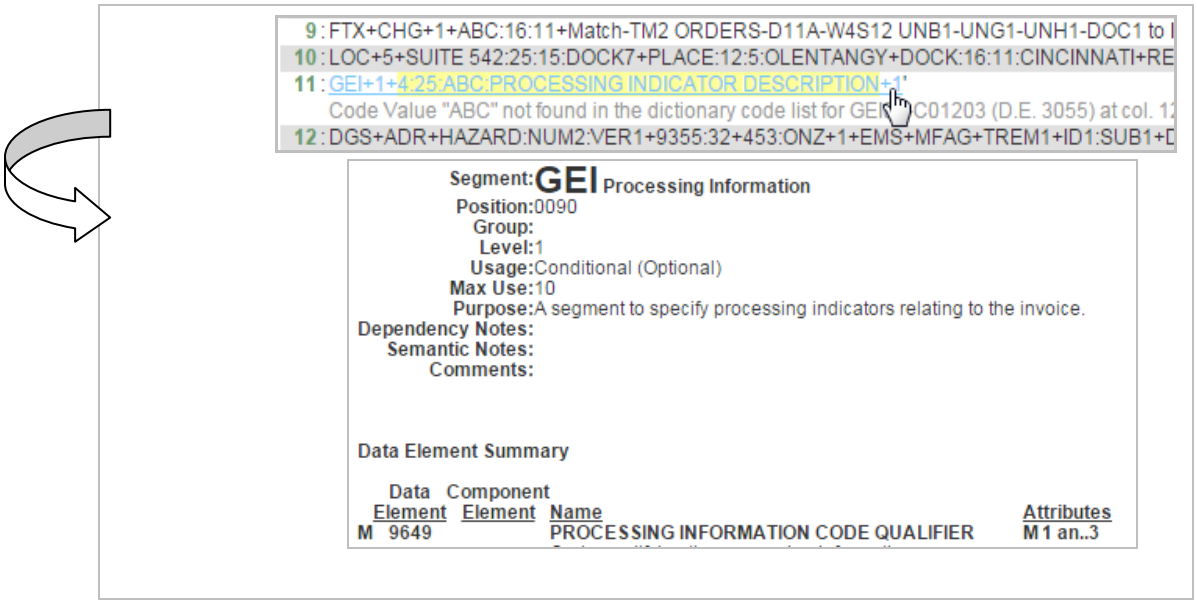
Users can reach the Raw EDI View if:

- data and validation detail results were submitted to Transaction Insight
- EDIFACT data and detail file are also in Foresight Archive and Retrieval System
- errors were found or the data was imported with Importer's savegooddata option
- you have assigned them appropriate permissions.

Validation Highlighter View

Validation Highlighter View allows users to see warnings and errors in EDIFACT data. Validation Highlighter View presents the EDIFACT data with warnings highlighted in yellow and errors highlighted in red.

Click on the warning/error to obtain information about how the segment should be used:



Users can reach the Validation Highlighter View if:

- data is EDIFACT
- data and validation detail results were submitted to both Transaction Insight and Foresight Archive and Retrieval System
- errors were found or the data was imported with Importer's savegooddata option
- the Archiver_UI_Importer workflow is running
- you have assigned them appropriate permissions.

For more detailed information about the Validation Highlighter tool, refer to **ValidationHighlighter.pdf**.

Warnings on HIPAA Forms and Errors Not In Form

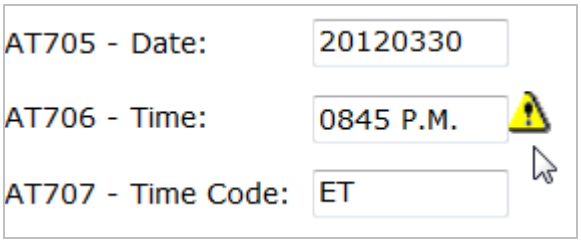
By default, HIPAA forms (Transaction Insight Healthcare edition only) and Errors Not in Form pages display errors, but do not display warnings.

To display warning messages:

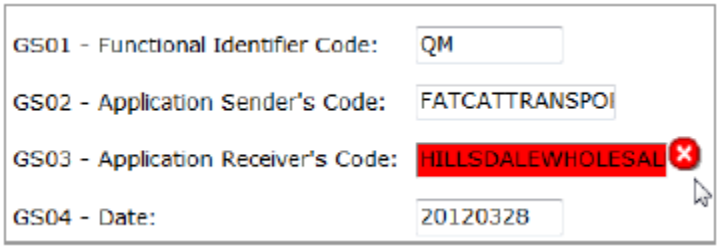
- Use the FormErrorCategoryThreshold setting in Web.config.
- Use Importer's **-savewarnings** parameter to store validation warnings in the database.

If these conditions are met, you will see warning icons AND error icons on forms as follows.

Warning icon on form:



Error icon on form:



Controlling a User's Access to Form, Paged Form, and Errors Not in Form Fields

Giving Form Permission to a User

A users' access to fields in HIPAA forms (Transaction Insight Healthcare edition only) and Errors Not In Form is determined by their:

Role Assignment Determines what form fields the user can view through Search Documents and Errors

Team Role Assignment
Determines what form fields the user can view and edit through My Tasks

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

This gives access to all fields:

These field access levels are set up in the form's xml file (see HIPAA Forms on page 158).

See Portal Permissions on page 131 for details.

Setting Access Levels for Form Fields

Transaction Insight initially gives users the ability to view and edit all form fields.

As administrator, you can change the edit and view levels for individual fields. To do this, edit the XML files listed in HIPAA Forms on page 158 (Transaction Insight Healthcare edition only).

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

EdiAccessControl.xml

Location Environment's Demo\TIWeb\EdiForms directory.

Transactions affected

See HIPAA Forms on page 158.

Tag controlling access

EdiElementAccess

Example

<EdiElementAccess Reference="//_834/BGN/BGN01" View="50" Edit="75" />

This restricts the BGN01 element for 834 transactions.

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

Those who have a role with form edit permission *greater than* 75 can edit this data on a form.

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

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

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

Where:

Attribute	Explanation	Examples
Reference	Location of data Items starting with a number should be preceded with an underscore: _834 needs underscore BGN no underscore Two slashes // mean to search all descendants to find this item One slash / means to search the immediate children of the current level to find this item If the location does not point to a specific element, all descendant elements of the location are included It is a good practice to always specify the transaction except for enveloping	"//_834/BGN/BGN01" This controls access to the BGN01 within 834 forms, as follows: //_834 transaction (ST) /BGN segment /BGN01 element ---------- "//_837P//_2010BA" This controls access to the entire 2010BA loop in 837P forms. //_837P transaction (ST) //_2010BA loop (uses // since preceding loop levels were omitted; note the underscore since 2010BA starts with a number) ---------- "//_837P//_2010BA/NM1/NM103"

(continued on next page)

Attribute	Explanation	Examples
		This controls access to the NM103 within the 2010BA in 837P forms. //_837P transaction (ST) //_2010BA loop /NM1 segment /NM102 element
Reference (Continued)	Location of data (Continued)	--- "//_837P//CLM/CLM11/CLM11.1" This controls access to the first sub-element in the composite in 837P forms. //_837P transaction (ST) //CLM segment /CLM11 composite /CLM11.1 subelement --- "//ISA02" This controls access to any ISA02 in any transaction. --- //_837P//_2300/DTP[DTP01='435']/DTP03 Any DTP03 where the DTP01 contains 435, in any 2300 loop in 837P forms. //_837P transaction //_2300 loop (note underscore) /DTP[DTP01='435'] segment (specifies *which* DTP) /DTP03 element
View	Users with View permission exceeding this setting can view this data on the form	"50"
Edit	Users with Edit permission exceeding this setting can edit this data on the form	"20"

Other XML Form Access Files

Other transactions are controlled in the XML files under the environment's TIWeb\EdiForms directory. Please see HIPAA Forms on page 158.

Location The environment's TIWeb\FormViewer\Forms directory.

Transactions affected Please see HIPAA Forms on page 158.

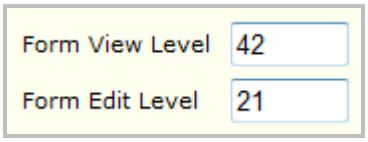
Tag controlling access Edit and view.

By using a text editor like Notepad or an XML editor, you can change the edit and view levels for any element listed.

This example controls access to the BHT01 form field.

```
<TS277A1__BHT01__HierarchicalStructureCode>
<edit>40</edit>
<view>20</view>
</TS277A1__BHT01__HierarchicalStructureCode>
```

It requires a user to have a role or team role permission of 21 or greater to view the BHT01 data in a form. It requires a user to have a team role permission of 41 or greater to edit the BHT01 data in a form:



Please contact TIBCO Foresight Technical Support for assistance with form field names.

Force Through

The form's **Force Through** button lets users submit documents that have uncorrected Type 7 and 8 errors.

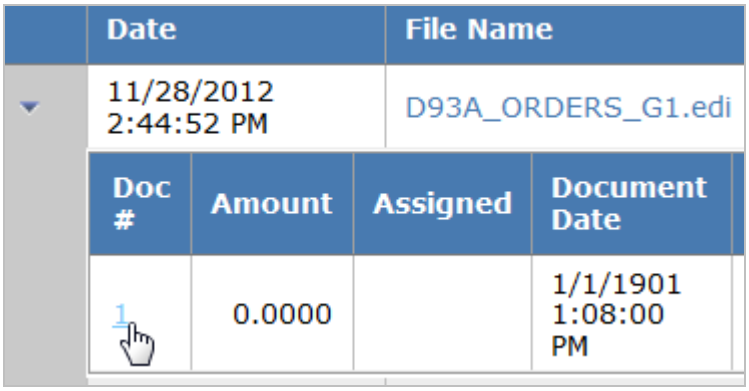
The form's **Delete/Return** button writes EDI and an XML file to a directory if the EDI has uncorrected errors.

Please see Force Through Processing in **TI_Reference_Manual.pdf**.

Opening a Form

Form data can be viewed in Transaction Insight through the Document Summary page, which is available through:

- My Tasks
- Search Documents
- Search Transmissions and then click the arrow in the first column to expand the transmission and click the Doc #:



The user must have a role with permissions that allow access to these pages, and must have Form View Level that lets them see the form fields. (See Permissions for Forms on page 142.)

For My Tasks, the user must also be assigned a Team Role that has **Edit Document** permission and a **Form View Level** and **Form Edit Level** that let them view and edit the form fields (see Permissions for Forms on page 142).

HIPAA Forms

(Transaction Insight Healthcare edition only.)

These are typical medical forms for HIPAA transactions.

They can be reached through a document summary page if:

- Data was validated with a HIPAA PDSA guideline or one merged with a PDSA guideline
- Data and validation detail results were submitted to Transaction Insight
- Errors were found or the data was imported with Importer's savegooddata option
- User has appropriate permissions including partner group, roles, and access control to fields.

HIPAA Transactions that have Forms

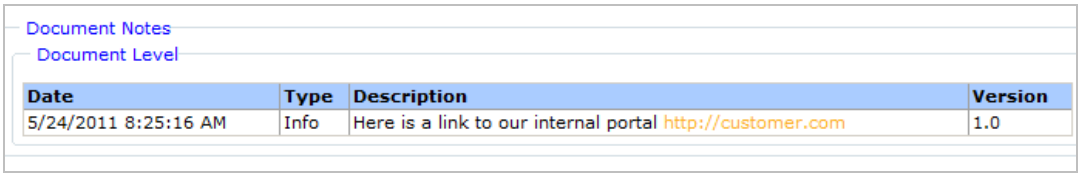
Note: In cases of no HIPAA form, Use Paged Form View (see page 149).

Transaction	HIPAA 5010	Errors Not In Form	Notes	Access Control File (see EdiAccessControl.xml on page 154) (directory under TIWeb\TI) 5010 access control
270	✓	✓		EdiForms\ EdiAccessControl.xml
271	✓	✓		EdiForms\ EdiAccessControl.xml
275		✓	no HIPAA form	
276	✓	✓		EdiForms\ EdiAccessControl.xml
277	✓	✓		EdiForms\ EdiAccessControl.xml
277CA		✓	no HIPAA form	
277U		✓	no HIPAA form	
278RP	✓	✓	no HIPAA form	EdiForms\ EdiAccessControl.xml
278RQ	✓	✓		EdiForms\ EdiAccessControl.xml
820		✓	no HIPAA form	
834	✓	✓		EdiForms\ EdiAccessControl.xml
835	✓	✓		TI\EdiForms\ EdiAccessControl.xml
837D	✓	✓	ADA form	TI\EdiForms\ EdiAccessControl.xml
837I	✓	✓	5010: UB04 form	TI\EdiForms\ EdiAccessControl.xml
837P	✓	✓	5010: new form	EdiForms\ EdiAccessControl.xml

10 Appendix E – Adding Notes to Documents

Where to see Notes

You can add notes to documents that are already in Transaction Insight. The user can see these notes on the Document Summary page:



Setting up External Notes

To set up external notes:

1. In Common Administration, choose **Settings | External Systems**.
2. Click Add new external system and fill out these fields:

   Identifier Your own ID for external notes

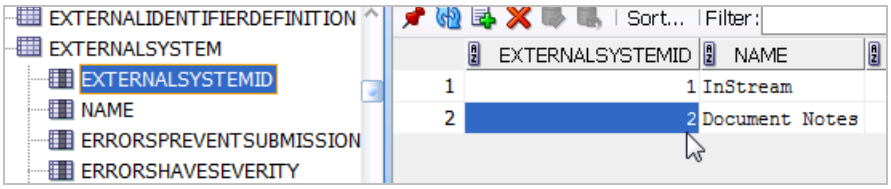
   Name Name for external notes

External System Types

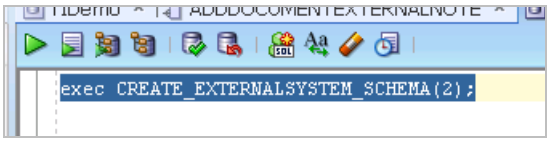
Order	Name
1	EDI Validation
2	Instream
3	Document Notes
	Add new external system type...

Other fields are ignored by external notes.

3. Look up its EXTERNALSYSTEMID in the EXTERNALSYSTEM table of your Transaction Insight database:



3. Run the CREATE_EXTERNALSYSTEM_SCHEMA procedure with the EXTERNALSYSTEMID as a parameter:

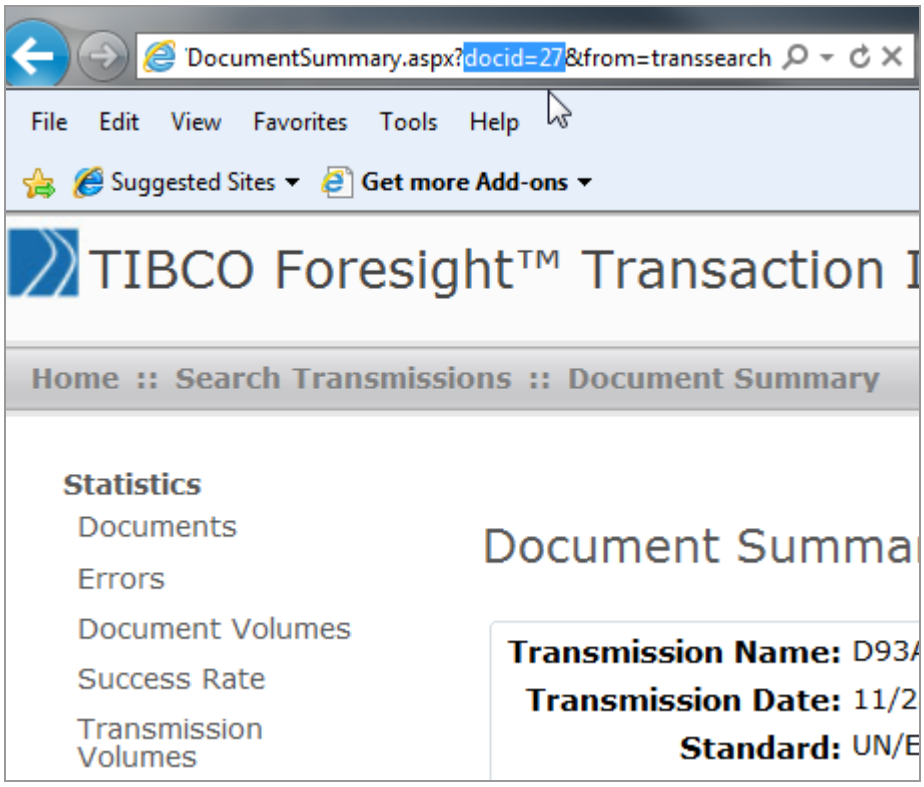


Adding a Note

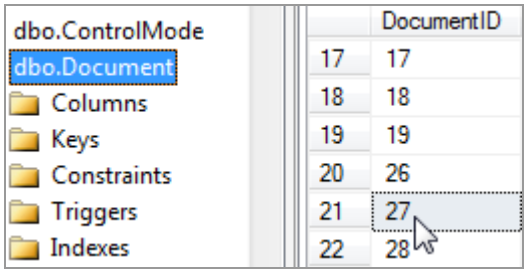
Use your own web service or other method to run the ADDDOCUMENTEXTERNALNOTE procedure with these parameters:

- DocumentID

  This is the application document's unique ID:

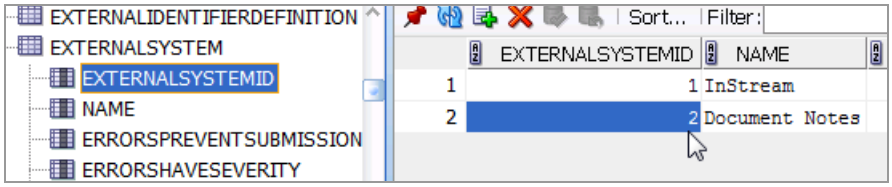


This is stored in TI's Document table:



- External System ID

This is the EXTERNALSYSTEMID in the EXTERNALSYSTEM table.



- Webservice version

  This is text of your choice.

- Type

  This is text of your choice.

- Description

  This is the note that is to appear on the Document Summary page. If you would like to include a link, start it with www or http.

  Example:

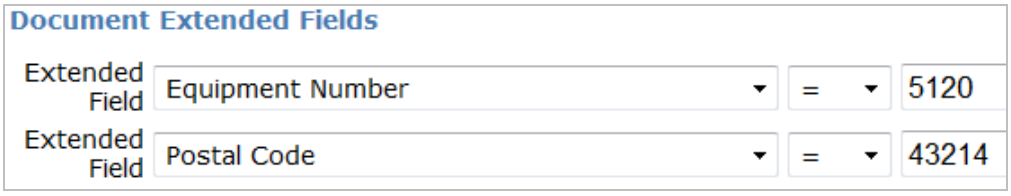
  exec ADDDOCUMENTEXTERNALNOTE (55,'1.0','Info','Here is a link to our internal portal http://customer.com',2)

11 Appendix F - Extended Fields

What is an Extended Field?

An extended field is one that you may choose to import for a particular transaction set. Use extended fields when you want to search by a particular value. There are no statistics by extended fields; **you cannot view statistics on extended fields in Transaction Insight**.

Example extended fields on the Search Documents pages:



Extended Fields versus Transaction Filters

- Extended fields can be strongly typed and come from SVALU records or z-records.
- Transaction filters are based on z-records only and are always saved as strings.

Example: Searching for "4" will not match a transaction filter value of "4.35" and you cannot search for values "greater than 4". A strongly-typed extended field, however, allows you to perform this search.

Feature	Extended Field	Transaction Filter
Document Summary	X	X
Bridge	X	X
Search	X	X
Statistics	-	X
Strong type	X	-
Z-record Source	X	X
SVALU Source	X	-

HIPAA and "Known Types" of Transactions

Note: HIPAA information pertains to Transaction Insight Healthcare edition only.

These have extended fields already identified and you just have to:

1. Go to **Settings | Document Fields** in Common Administration.
2. Select the standard and transaction in the upper right corner.
3. Move fields by selecting them and using the arrow buttons to put them where you want them to be.

   Those in **Available Fields** are not being stored in the database.

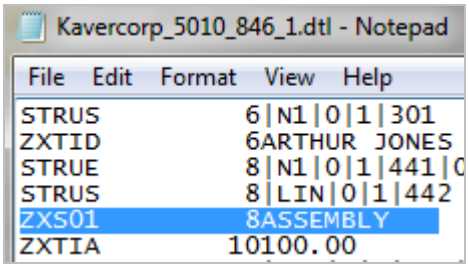
   Those in **Fields to store in database** are being stored and users can display them with Choose Fields on the Transmissions page.
4. Set SVALU=1 in the validation profile and validate with a guideline that creates SVALU records, such as a PDSA guideline or one that is merged with a PDSA guideline.

These extended fields are also available in TIBCO Foresight® BI Bridge® – BAM Extract.

To define extended fields:

1. Use ZX custom records to add extended fields to any generic X12 or EDIFACT guideline.

   Example:



   Record names and content include:

   ZX**D**00-ZXD99
   Date/time values in this pattern: CCYYMMDD[hhmm[ss[d[d]]]].

   As a minimum, it contains an 8-byte date. The date is assumed to be in CCYYMMDD format. Time is assumed to be in TTMM format with the 24-hour clock. To include both a date and time in this record, you would need to create a business rule that appends the time to the date and stores the result in a variable.

   Example: Z-record ZXD03 might contain `201112011304` to indicate 1:04 PM on December 1, 2011.

ZXF00-ZXF99	Floating point values. Example: 10.938
ZXM00-ZXM99	Monetary values. Example: 100.00
ZXN00-ZXN99	Number (integer). Example: 500
ZXS00-ZXS99	String

2. Contact TIBCO Foresight Technical Support for a script that will let you update the DocumentFieldDefinition table in the Transaction Insight database.

3. Import some data that has the Z-record.

These extended fields are not available in BI Bridge® – BAM Extract.

Testing the Extended Fields

1. Go to the Search Documents page and select the version and transaction or message.
2. Drop down an Extended Field filter and see if the extended field is listed.
3. Import some data that contains the field and see if you can find it with the extended field filter.

12 Appendix G - Exception Page Customization

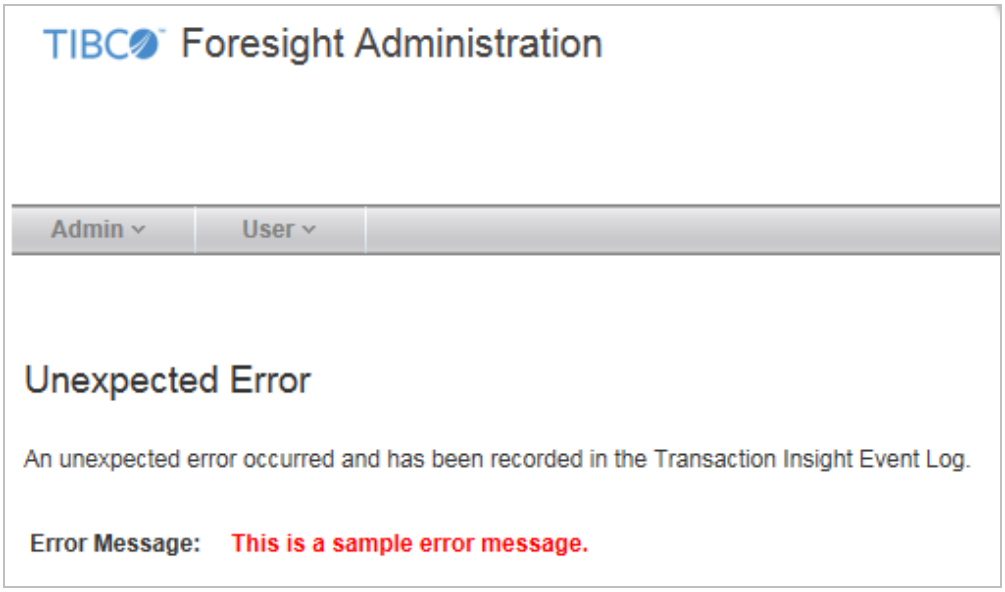
Overview

This section details how, in the case of an exception condition, Transaction Insight Administrators can redirect users from a generic error screen to a page featuring a design that is compatible with the appearance of the Transaction Insight portal.

Specifying the Exception Condition Page

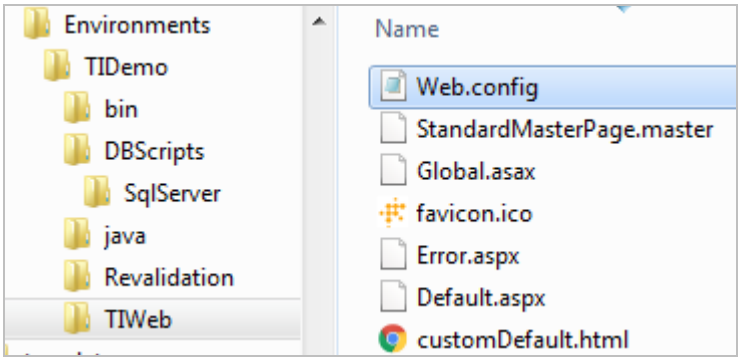
By default, when an exception occurs, Transaction Insight users are presented with a generic ASP.NET error page:

You can edit TI's web.config file to direct Transaction Insight to display a more user-friendly page:



Procedure

1. Use a text editor tool to open the web.config file. (This file is found in TI's Environments > TIDemo > TIWeb directory.)



2. Search for the following field
   `<customErrors defaultRedirect="Error.aspx" mode="Off" />`
   Note: When the field is set to Off (default), generic ASP.NET error information is always displayed.

3. Update the `mode=` parameter to one of the following:
   - On - Always display custom page.
   - RemoteOnly - Display custom page only to users not running on the local Transaction Insight Web server. This setting is recommended for security purposes; it prevents the display of application detail information to remote clients.

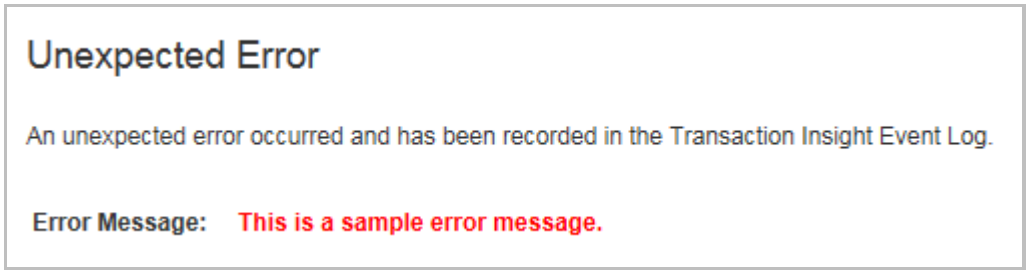
Examples:

```
<customErrors defaultRedirect="Error.aspx" mode="On" />
<customErrors defaultRedirect="Error.aspx"
mode="RemoteOnly" />
```

4. Save and close the file.

Editing the Exception Condition Page

The web.config file redirects the system to the file Error.aspx. The default Error.aspx file produces a page that looks like this:

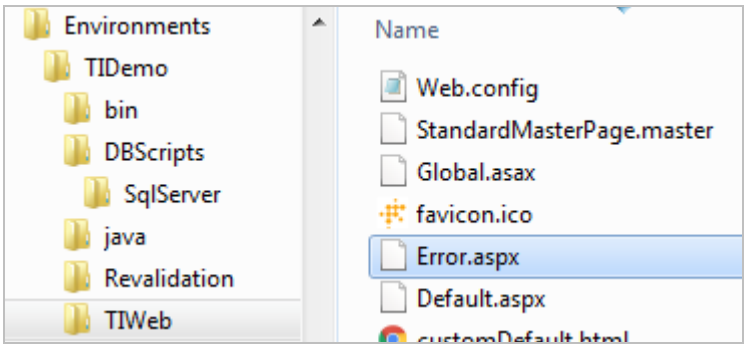


The Error.aspx file can be customized in a limited fashion. These include:

- Font size
- Font color
- Message text.

Procedure

1. Use a text editor tool to open the Error.aspx file. (This file is found in the Environments > TIDemo > TIWeb directory.)



2. Edit the fields as desired.

   Examples:

   Change font size:

```
      <asp:Label ID="errorTitleLabel" runat="server" Font-
Size="24">Unexpected Error</asp:Label>
```

Change font color:

```
    <asp:Label ID="errorMessageLabel" runat="server"
ForeColor="Blue" Font-Bold="True"><%= errorMessage
```

4. Save and close the file.