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Informatica® B2B Data Exchange
10.2.2 Hotfix 1

Partners Portal Guide

Informatica B2B Data Exchange Partners Portal Guide
10.2.2 Hotfix 1
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Preface

The *B2B Data Exchange Partners Portal Guide* provides information about the operational tasks in the B2B Data Exchange Partners Portal.

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CHAPTER 1

Partners Portal Introduction

This chapter includes the following topics:

Partners Portal Overview

B2B Data Exchange processes complex structured and unstructured documents, such as NACHA and EDI documents, SWIFT and HIPAA transactions, and other documents and messages.

In the B2B Data Exchange system, the organization or department that manages B2B Data Exchange is known as the Organization, and the vendors, customers, or departments that send documents to be processed or receive processed documents from the B2B Data Exchange administrative Organization are known as Partners.

A partner can be a vendor or a customer, or an internal system such as an accounting application or an ERP system. Each partner contains one or more accounts. At a customer site, an account can be a division, a department, or a subsidiary. In an internal system, an account can be a customer ID or a vendor code.

You can use the Partners Portal to track and monitor the flow of documents that you send and receive with B2B Data Exchange to the Organization. Use the Partners Portal to safely, quickly, and easily monitor the files, transactions, documents, and messages that B2B Data Exchange processes.

The Partners Portal contains tabs with different views of the file processing events, such as charts, reports, and an event list. You can use the views to get a quick picture of overall traffic, determine the success rate or failure rate of file processing, or drill down to troubleshoot specific problems.

With the Partners Portal you can view the status and processing of the file transfers. Use the portal to determine if there were any errors during file transfers, or view statistics for the traffic flow of documents. If needed, you can use the Events List view to see all the events related to file transfers, and troubleshoot any errors in file processing.

Note: To ensure security and privacy, a Partners Portal user only views events related to the Partner entity assigned to the user.

Partners can use the Partners Portal for collaborative on-boarding. Partners can view and update their B2B Data Exchange message profiles to meet specific processing needs. B2B Data Exchange Operators can and approve or reject the Partner changes. Partners can view their endpoint communication settings, and configure the password for FTP hosted by B2B Data Exchange and Managed File Transfer.

Partners can use the Partners Portal to securely upload and download files for B2B Data Exchange. You can view a report of uploaded and downloaded files and the status of uploaded files. You can view the events of an uploaded file that is in progress or has completed uploading.

Logging In to the Partners Portal

Once you receive a registration email for the Partners Portal from the B2B Data Exchange Organization administrator, you can login and change your password, then monitor your B2B Data Exchange documents.

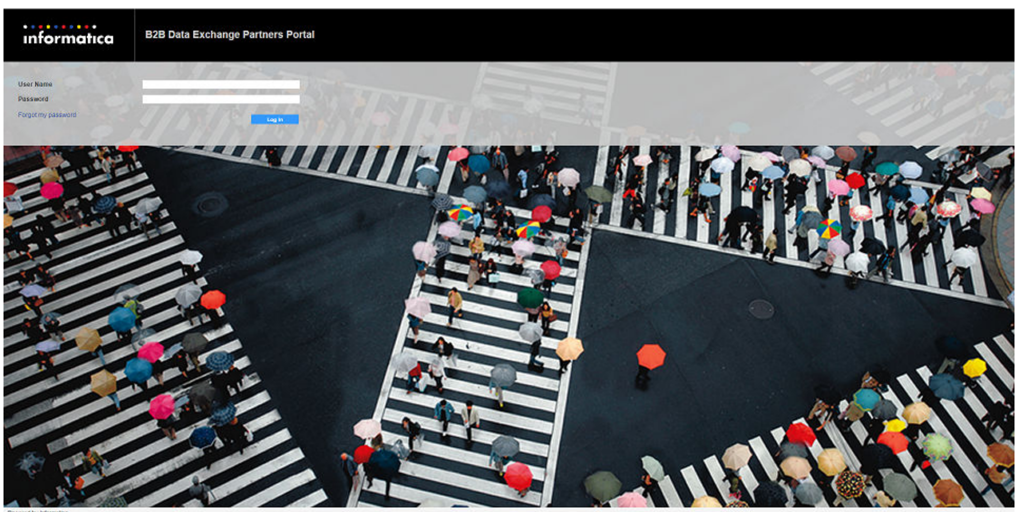
The minimum screen resolution requirement is 1200 X 800.

If your browser is Microsoft Internet Explorer version 10 or version 11, do not use compatibility mode to view the Partners Portal. Ensure that the setting is non-compatibility mode.

1. To access the Partners Portal and set your password, click the reset password link in the registration email.

   Note: To ensure security, the reset password link is valid for only 72 hours after receipt. After that time, click the forget password link to receive another registration email.

   The following image shows the Partners Portal login page:

   The Partners Portal login page shows the organization logo.

2. Change the password to a unique password. Your password must be at least eight characters long and contain a number and an English letter.

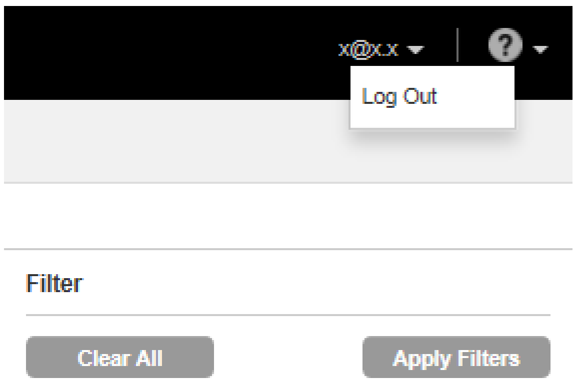
Logging Out of the Partners Portal

You can log out of the Partners Portal at any time. All events are maintained in the B2B Data Exchange server.

It is recommended that you securely log out of the Partners Portal instead of closing the browser. After 20 minutes of inactivity, you are automatically logged out.

▶ To log out of the Partners Portal, click the user name menu in the upper right corner and select **Log Out**.

The following image shows the user name menu:

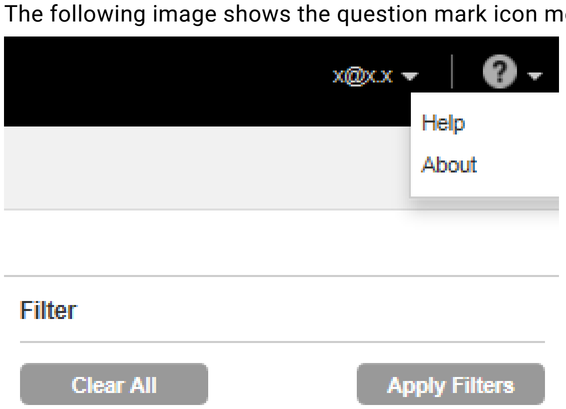


Getting Help

You can open the on-line help for the Partners Portal from any tab. You can also view version details for the portal if needed.

1. To access the on-line help for the Partners Portal, click the question mark icon in the upper right corner of the Partners Portal.
2. To view the version and copyright details of the Partners Portal, click the question mark icon menu in the upper right corner and select **About**.

   The following image shows the question mark icon menu:



CHAPTER 2

Dashboard

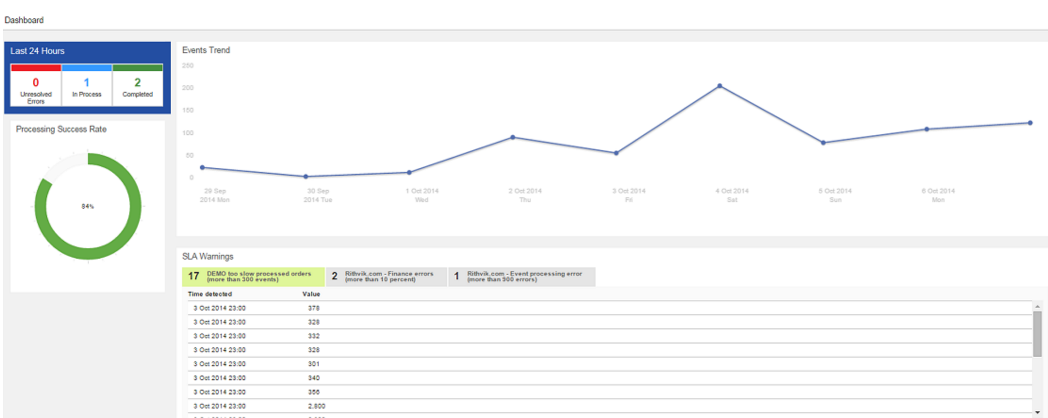
This chapter includes the following topics:

Dashboard Overview

The Dashboard in the Start tab provides summary information about B2B Data Exchange file processing. The Dashboard contains a collection of panels that display visual charts and reports and key metrics that summarize the file processing activity, such as which files were successfully processed during the last 24 hours, or the error rate for a specific time period.

Each panel displays a different set of key metrics. The metrics address typical business needs and help you assess the system activity and find issues that you might need to address. The metrics quickly summarize statistical information about the processed data and file exchange.

The following image shows the Dashboard:



Note: If the B2B Data Exchange Dashboard and Reports component was not deployed by the B2B Data Exchange organization, only the Last 24 Hours panel is displayed.

Most of the panels in the Dashboard contain aggregated information that can be further filtered. You can apply a filter to focus on specific events or a particular period of time.

You can click each panel, except the SLA Warnings panel, to view the related list of events. The events provide information about the system activity related to B2B Data Exchange message processing.

The Last 24 Hours metrics are updated from the real time data base, whereas the other metrics are updated from the operational data store. The operational data store is a repository that contains aggregated information about completed events that B2B Data Exchange has processed. Events can be completed successfully or with errors. The aggregated information in the operational store can be used to monitor B2B Data Exchange business activity.

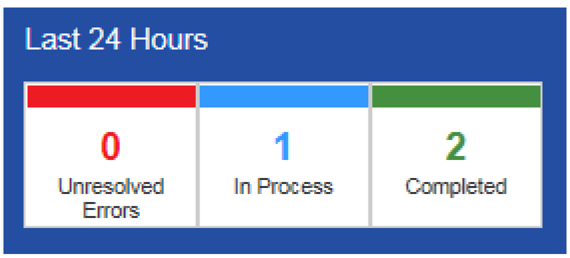
Dashboard Panels

The Dashboard contains a collection of panels with visual charts that summarize the file processing activity in B2B Data Exchange.

Last 24 Hours

The Last 24 Hours panel displays metrics for events created in the last 24 hours, grouped by unresolved errors, events in process, and successfully completed events.

The following image shows the Last 24 Hours panel:



Use the panel to quickly identify current issues with your B2B Data Exchange processes. You can click each element in the panel to drill down to the events list and show all the related events in the Monitoring Events tab. The panel has the following elements:

Unresolved Errors

Displays current error events for all B2B Data Exchange events created in the last 24 hours.

In Process

Displays all events that were created and are still in process during the past 24 hours.

Completed

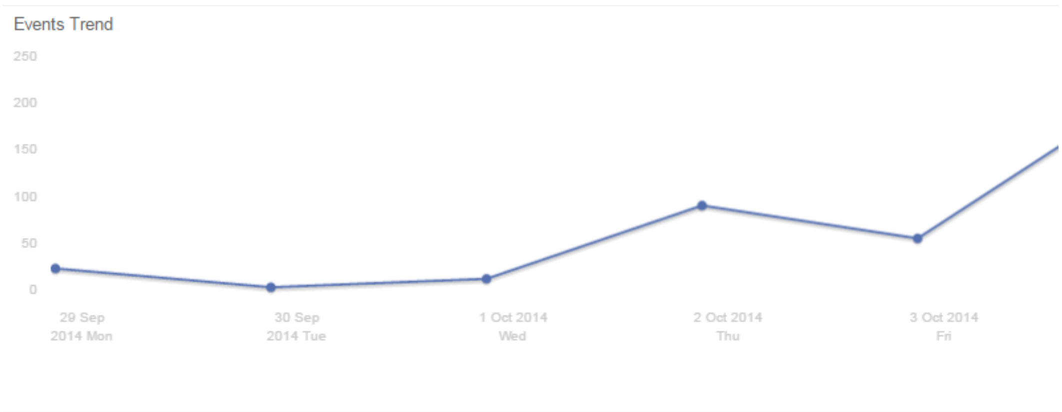
Displays all events that were created and completed during the past 24 hours.

Note: The Dashboard filter does not apply to this panel.

Events Trend

The Events Trend panel displays the number of events per day in the selected time frame. Use the chart to evaluate traffic trends over time.

The following image shows the Events Trend panel:



Use the panel to identify event traffic peaks, and identify time periods that might require further attention. You can click the chart to display the related events for the chart.

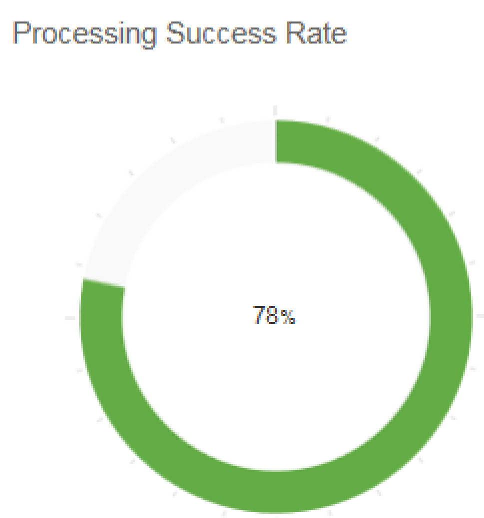
You can use the Dashboard filter on this panel, for example to focus on specific problems. Use the filter to identify processing traffic issues by selecting to see events of a specific type or status.

The panel displays data in periods of a day.

File Processing Success Rate

The File Processing Success Rate panel displays the percentage of successful events during the selected time frame.

The following image shows the File Processing Success Rate panel:



You can use the panel to confirm that files processed successfully, or identify files that might require further attention. You can click the graph to display the error events for the selected time period.

Note: Any event status that is final and not assigned an error status is considered a success.

You can click the graph to display the error events for the selected time period.

The panel is color coded. When the percentage of successful events falls below thresholds set by the B2B Data Exchange organization administrator, the panel changes to yellow, and then to red.

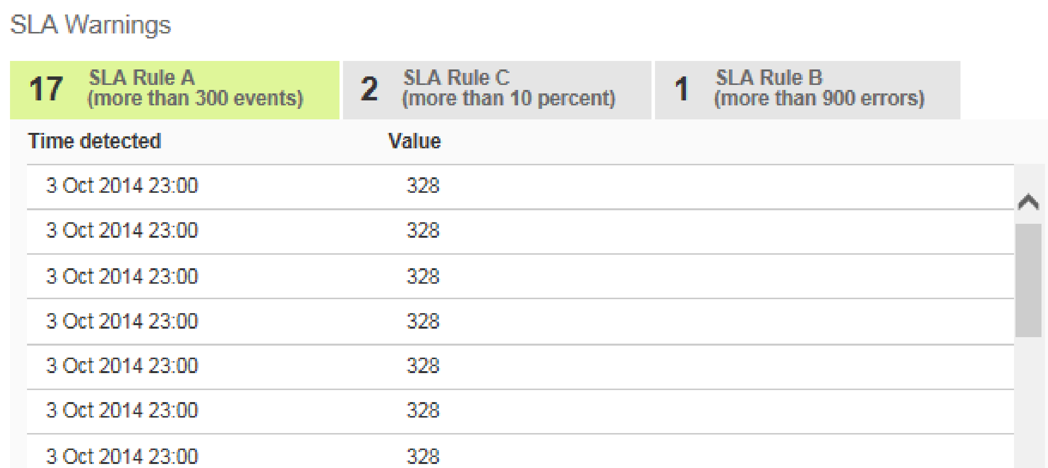
You can use the Dashboard filter on this panel.

Note: The Event Status filter does not apply to this panel.

SLA Warnings

The SLA Warnings panel displays information about service level agreement (SLA) warnings. The panel shows the three SLA rules with the largest number of warnings in the selected time frame. Use the panel to identify deviations from SLA requirements that need further attention.

The following image shows the SLA Warnings panel:



The following list describes the SLA Warnings panel elements:

SLA Rule Name

The name of the SLA rule appears at the top of each section. The parenthesis () contains the SLA rule condition and threshold value.

Number of warnings

The total number of SLA warnings related to the specific SLA during the selected time period. If there are more than 50 warnings, 50+ is displayed.

Time Detected

The time that the warning was detected by the system.

Value

The actual value for the warning. For example, if you define a rule that event processing must not exceed 30 seconds and the actual processing time is 45 seconds, the **Value** column shows the total processing time as 45 seconds.

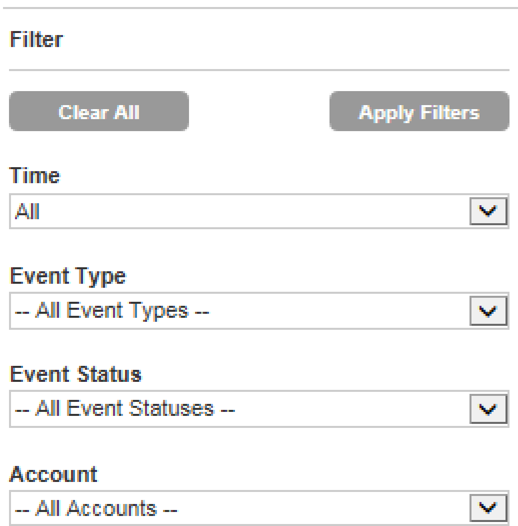
Note: The Event Type and Event Status filters do not apply to this panel.

Filter the Dashboard

You can use a filter to narrow the data for the Dashboard and provide a more focused Dashboard. Once you apply a filter, the Dashboard updates all the charts to which the filters apply.

1. In the Filter pane, you can apply one or more filters to the event data used to produce the Dashboard.

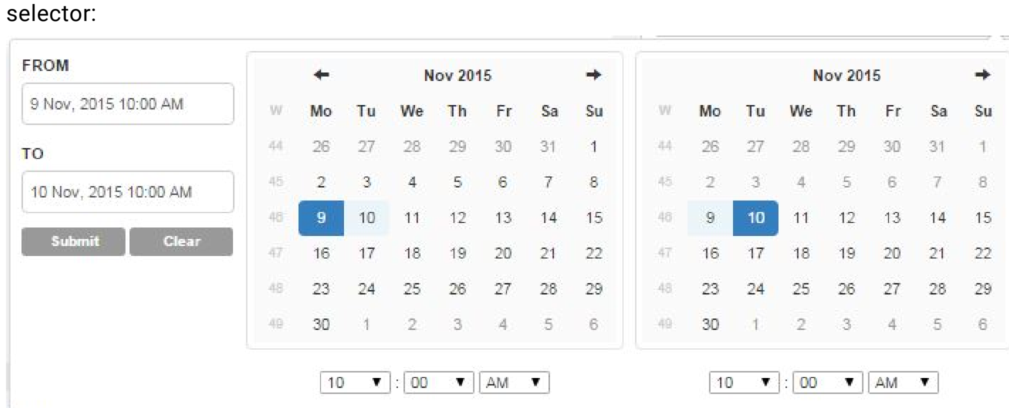
   The following image shows the Dashboard filter:

   For example, to search for events in a specific time frame relevant to an event status, select the time frame and event status.

2. To filter for a specific time frame, select the time frame in the **Time** field. To search for a custom time, select **Custom time frame**. Click in the field that displays the date.

   The **Custom time frame** selector is displayed. The following image shows the **Custom time frame** selector:

   Select the start time and date and end time and date. If you select a non-valid period, the time frame setting reverts to the previous setting.

3. Click **Apply Filters**.

   The Dashboard page displays the updated charts.

4. After you apply a filter, to return to the system default click **Clear All**.

Dashboard Filter Properties

You can apply a filter to the dashboard to focus on a specific time period, event type, event status, or account, or any combination of these.

The following table describes the properties that you can use to filter events:

Filter	Description
Account	Related account for the events. You can also choose all accounts.
Event Status	Status of the event. You can choose one of the following options: - All - All Error Statuses - All Event Statuses - All Final Statuses - Complete - Critical - Delayed - Error - New - Pending - Pre-Processing (only relevant to Data Integration Hub) - Processing (only relevant to Data Integration Hub) - Rejected - Reprocessed - Successfully Completed - Transferring - Warning **Note:** The Event Status property might display other customized options that the B2B Data Exchange organization administrator created to address specific tracking needs. **Note:** Some Event Status options are only relevant to Data Integration Hub and are not used by B2B Data Exchange.

Filter	Description
Event Type	Type of the event. You can choose one of the following options: - Aggregated Subscription (only relevant to Data Integration Hub) - All - All Event Type - Compound Subscription (only relevant to Data Integration Hub) - Custom Event - File Event - File Level Event - Functional Subscription (only relevant to B2B Data Integration Hub) - Group Level Event - Publication (only relevant to Data Integration Hub) - Segment Level Event - Subscription (only relevant to Data Integration Hub) - System Event **Note:** The Event Type property might display other customized options that the B2B Data Exchange organization administrator created to address specific tracking needs. **Note:** Some Event Type options are only relevant to Data Integration Hub and are not used by B2B Data Exchange.
Time	Time period during which the event were created. You can choose one of the following options: - All - Custom Time Frame - Last hour - Last two hours - Last 24 hours - Last 7 days - Last 30 days - Today - Yesterday

Message Processing Event Types and Statuses

B2B Data Exchange provides a set of default B2B Data Exchange event types and event statuses for message processing events.

Default Event Types

When B2B Data Exchange processes messages, it assigns the following event types to message processing events:

- Custom Event. Indicates a predefined custom event.
- File Level Event. Indicates an event generated at the start of the processing. This is the parent event for all other events generated during the course of processing the document.
- Group Level Event. Indicates an event associated with groups included in a document.
- Segment Level Event. Indicates an event associated with segments included in a document.
- System Event. Indicates an event generated by the B2B Data Exchange server for system notifications.
- Transaction Level Event. Indicates an event associated with transactions included in a document.

Default Event Statuses

For message processing events, B2B Data Exchange assigns the following event statuses:

- Complete. Assigned when the event completes processing. Child events might, however, still be processing. Message reconciliation can be completed later.

- Pending. Assigned while the event waits to be processed. The event is assigned this status from the moment it is created until the status changes.
- Error. Assigned when the event processing produces an error.
- Critical. Assigned when the event processing produces a critical error.
- Reprocessed. Assigned when the event is processed again.
- Warning. Can be assigned when the event processing produces specific problematic states.
- New. This event type is not currently used.
- Rejected. Assigned when the message was rejected.
- Transferring. Assigned while the message is transferred from B2B Data Exchange to an outbound endpoint. After the transfer is finished, B2B Data Exchange changes the event type to Complete or Error depending on the result.
- Delayed. Assigned if message processing is delayed due to processing rules, if message processing waits for a processing rule to release the message, or if message processing waits for a manual release.
- Discarded. Assigned when the event is delayed and then discarded due to a processing rule, or discarded manually.

Aggregated Statuses

An Aggregated status indicates the overall state of message processing. When an event has child events, for example when a file contains several transactions, the aggregated status indicates the status of all the child events. B2B Data Exchange assigns the following aggregated statuses:

- Delayed: Assigned if message processing is delayed due to processing rules, or if message processing waits for a processing rule to release the message, or if message processing waits to be manually released.
- Error: Assigned when the event processing produces an error.
- Final: Assigned when the event processing finalizes.
- In Process: Assigned while the event is processing.

CHAPTER 3

Monitoring Events

This chapter includes the following topics:

Monitoring Events Overview

B2B Data Exchange generates events as it processes file, and it changes the status of the events as they go through the transformation process. The Monitoring Events tab provides detailed information for every document that the system processes in a given time frame. You can search for events related to specific issues. You can also select a specific event to view further details.

The following image shows the Events List:

Monitoring Events

Events (43)

Event ID	Account	Start Time	Event Status	Event Type	Reconciliation Status	Aggregated Status
167009	2nd account	1 Feb 2016 20:05	Pending	File Level Event		
167008	2nd account	1 Feb 2016 20:04	Pending	File Level Event		
167007	2nd account	1 Feb 2016 20:03	Pending	File Level Event		
167006	2nd account	1 Feb 2016 20:03	Pending	File Level Event		
167005	2nd account	1 Feb 2016 20:03	Pending	File Level Event		
167004	2nd account	1 Feb 2016 20:03	Pending	File Level Event		
167003	2nd account	1 Feb 2016 20:03	Pending	File Level Event		
167002	2nd account	1 Feb 2016 20:03	Pending	File Level Event		
110003	2nd account	7 Dec 2015 10:17	Pending	File Level Event		
104002	2nd account	28 Nov 2015 15:17	Complete	File Level Event		
100003	2nd account	19 Nov 2015 18:11	Complete	File Level Event		
100002	2nd account	19 Nov 2015 12:11	Complete	File Level Event		
100001	2nd account	17 Nov 2015 14:14	Complete	File Level Event		
99002	2nd account	17 Nov 2015 13:24	Complete	File Level Event		
90003	2nd account	8 Nov 2015 11:11	Reprocessed	File Level Event		
90002	2nd account	8 Nov 2015 10:58	Pending	File Level Event		
87002	2nd account	5 Nov 2015 18:06	Pending	File Level Event		
83002	2nd account	1 Nov 2015 11:48	Complete	File Level Event		
77008	account test	26 Oct 2015 14:53	Error	File Level Event		

To sort the events, click the title of the column which you want to sort. If you click again, the events are displayed in reverse order. A third click returns to the default view.

To view more details, click the event. When you select an event, the Details panel displays additional data for that event.

To track a set of events, filter the Monitoring Events. For example, select a time frame, account, event type, or event status to filter events in the Events List.

Up to 5000 events can be displayed in the Monitoring Event tab. The B2B Data Exchange Organization administrator can configure the number of events to be displayed.

Monitoring Events Properties

The Monitoring Events tab contains a list of events and their properties based on information that the Partners Portal collects from the run-time repository.

The following table describes the event properties displayed in the Monitoring Event list:

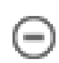
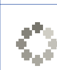
Properties	Description
Account	Name or identifier of the related account. An account generally represents a department or function in the partner company.
Aggregated Status	Indicates the overall state of message processing. When an event has child events, for example when a file contains several transactions, the aggregated status indicates the status of all the child events. The Aggregated Status property has the following status options and icons: - Delayed: Assigned when child events have a Delayed status. This occurs if the processing for child messages is delayed due to processing rules, or if the processing for child messages waits for a processing rule to release the message, or if the processing for child messages waits to be manually released. - Error: Assigned when the child events have an error status. This happens when child event processing produces an error. - Final: Assigned when the child events have a Final status after processing finalizes. - In Process: Assigned while the child events have a Pending status, as the child events are still processing.
Event ID	Unique identifier for the event. An event status icon is displayed next to the Event ID. For an explanation of the icons, see "Aggregated Status Icons" on page 20 and "Event Status Icons" on page 21 .
Event Status	Status of the event. The Event Status property has the following status options and icons: - Complete - Critical - Delayed - Discarded - Error - New - Pending - Pre-Processing (only relevant to Data Integration Hub) - Processing (only relevant to Data Integration Hub) - Rejected - Reprocessed - Transferring - Warning For more information about Event Status properties, see "Message Processing Event Types and Statuses" on page 16. **Note:** The Event Status property might display other customized options that the B2B Data Exchange organization administrator created to address specific tracking needs. **Note:** Some Event Status options are only relevant to Data Integration Hub and are not used by B2B Data Exchange.

Properties	Description
Event Type	Type of the event. The Event Type property has the following type options: - Aggregated Subscription (only relevant to B2B Data Integration Hub) - Compound Subscription (only relevant to B2B Data Integration Hub) - Custom Event - File Event (only relevant to Data Integration Hub) - File Level Event - Functional Subscription (only relevant to B2B Data Integration Hub) - Group Level Event - Publication (only relevant to Data Integration Hub) - Segment Level Event - System Event - Subscription (only relevant to Data Integration Hub) For more information about Event Type properties, see "Message Processing Event Types and Statuses" on page 16. **Note:** The Event Type property might display other customized options that the B2B Data Exchange organization administrator created to address specific tracking needs. **Note:** Some Event Type options are only relevant to Data Integration Hub and are not used by B2B Data Exchange.
Reconciliation Status	Status of a reconciliation associated with the message processing. An example of a reconciliation is when the organization sends a file containing transactions such as payments or orders that requires partner acknowledgment. When the organization sends the file to the partner, B2B Data Exchange initiates a reconciliation process. When the organization receives acknowledgment from the partner, for example for the payment or order, B2B Data Exchange completes the reconciliation. When a reconciliation is initiated for an event, it sets a limit to the amount of time that the reconciliation can take to complete. The reconciliation status of an event indicates whether the B2B Data Exchange completed the reconciliation within the time limit.
Start Time	The time the event started.

Aggregated Status Icons

Each event in the Event List displays a status icon.

The following table shows the Aggregated Status icons:

Properties	Icon
Delayed	
Error	
Final	
In Process	

Event Status Icons

Each event in the Event List displays a status icon.

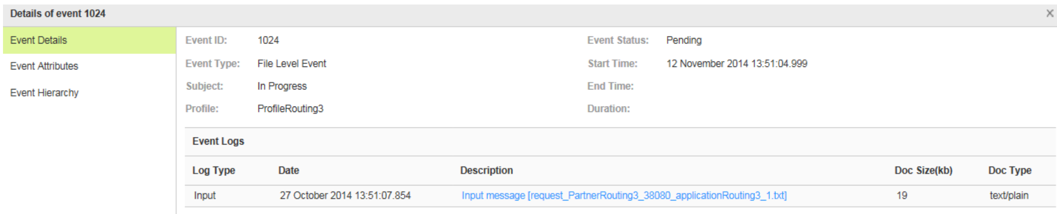
The following table shows the Event Status icons:

Properties	Icon
Complete	
Critical	
Delayed	
Discarded	
Error	
New	
Pending	
Pre-Processing	
Processing	
Rejected	
Reprocessed	
Transferring	
Warning	
Custom properties are assigned one of four icons	.

Details Panel

When you click an event in the Monitoring List tab, the Details panel shows further details for the selected event. The Details panel contain tabs in which you can review different event properties based on information that B2B Data Exchange collects for an event.

The following image shows the Details panel:



Note: When you open the Details panel the event data is refreshed, so the Details panel might present a more recent status then the Monitoring Events display.

The Details panel has the following tabs:

Event Details

Displays basic event details and related event logs.

Event Attributes

Event Attributes are used to specify or collect additional event information at run time.

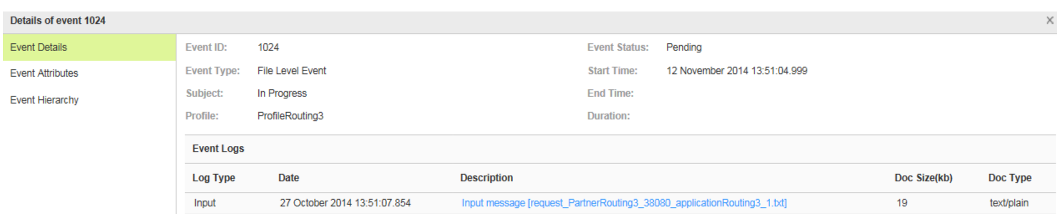
Event Hierarchy

Displays the event, the parent event, and any related child events when an event has child events, for example when a file contains several transactions.

Event Details Properties

The Events Details tab contains general event properties based on information that B2B Data Exchange collects for an event.

The following image shows the Events Detail tab:



The following table describes the Events Details properties:

Panel	Description
Duration	The length of time between the creation of the event and when the event was assigned a final status. If the event was not yet assigned a final status, the field is empty.
End Time	The time the event ended.
Event ID	Unique identifier for the event.

Panel	Description
Event Status	Status of the event. The Event Status property has the following status options: - Complete - Critical - Delayed - Discarded - Error - New - Pending - Pre-Processing (only relevant to B2B Data Integration Hub) - Processing (only relevant to B2B Data Integration Hub) - Rejected - Reprocessed - Transferring - Warning For more information about Event Status properties, see "Message Processing Event Types and Statuses" on page 16. **Note:** The Event Status property might display other customized options that the B2B Data Exchange organization administrator created to address specific tracking needs. **Note:** Some Event Status options are only relevant to B2B Data Integration Hub and are not used by B2B Data Exchange.
Event Type	Type of the event. The Event Type property has the following type options: - Aggregated Subscription (only relevant to B2B Data Integration Hub) - Compound Subscription (only relevant to B2B Data Integration Hub) - Custom Event - File Event (only relevant to Data Integration Hub) - File Level Event - Functional Subscription (only relevant to B2B Data Integration Hub) - Group Level Event - Publication (only relevant to Data Integration Hub) - Segment Level Event - System Event - Subscription (only relevant to Data Integration Hub) For more information about Event Type properties, see "Message Processing Event Types and Statuses" on page 16. **Note:** The Event Type property might display other customized options that the B2B Data Exchange organization administrator created to address specific tracking needs. **Note:** Some Event Type options are only relevant to Data Integration Hub and are not used by B2B Data Exchange.
Profile	Profile name associated with the document processing workflow. A profile defines how to process a document for a partner or an account.
Start Time	The time the event started.
Subject	Attribute that is commonly used to describe important processing information.

The following table describes the Event Logs properties:

Panel	Description
Date	When the event log was created.
Description	Description of the log. If you click the description, a Log tab displays with the log content.

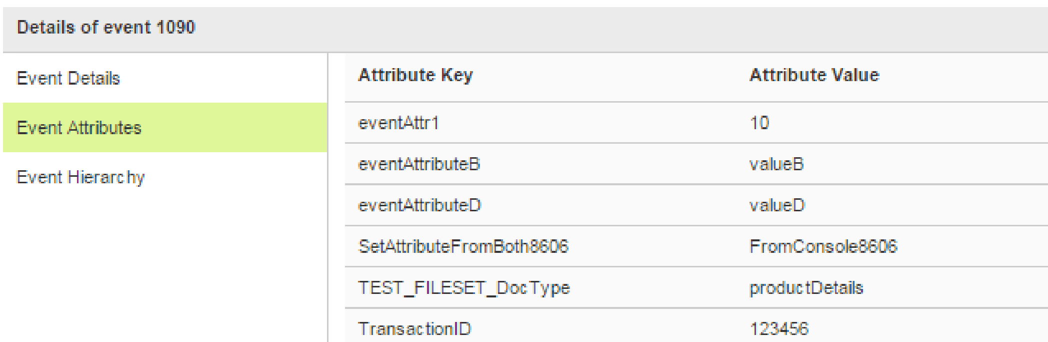
Panel	Description
Doc Size	Size of the document in KB. You can click the link to access the log document.
Doc Type	Format of the document, for example text or HTML .
Log Type	Type of event log associated with the event. The property has the following options: - Input - Intermediate - Output

Logs are displayed in chronological order according to the date that they were created.

Event Attributes Properties

The Event Attributes tab contains different attribute properties based on information that B2B Data Exchange collects during event processing.

The following image shows the Event Attributes tab:



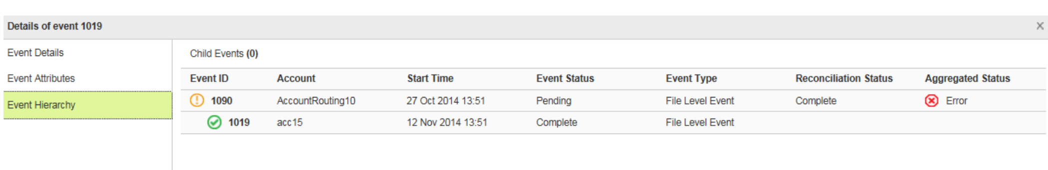
The following table describes the Event Attributes properties:

Panel	Description
Attribute Key	The attribute name or identifier.
Attribute Value	Value of the attribute.

Event Hierarchy Properties

The Event Hierarchy tab shows the parent event and child events associated with an event, and the properties for each associated event.

The following image shows the Event Hierarchy tab:



The Event Hierarchy tab shows the same event properties that are displayed in the Monitoring Events tab. To see further details of a child event, click any child event row. Up to 100 child events are displayed. The B2B Data Exchange organization administrator can configure the number of child events displayed in the Event Hierarchy tab.

Refreshing the Events

To view the latest events, you can refresh events in the Monitoring Events tab.

▶ To refresh the events in the Monitoring Events tab, click the refresh icon .

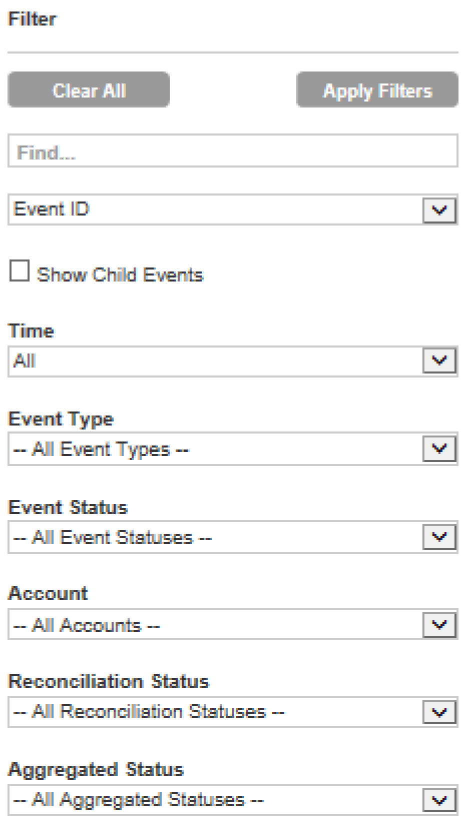
The events list is updated with the latest events.

Filter the Events

You can use a filter to narrow the focus of the Monitoring Events tab. Once you apply a filter, the Partners Portal updates the events list.

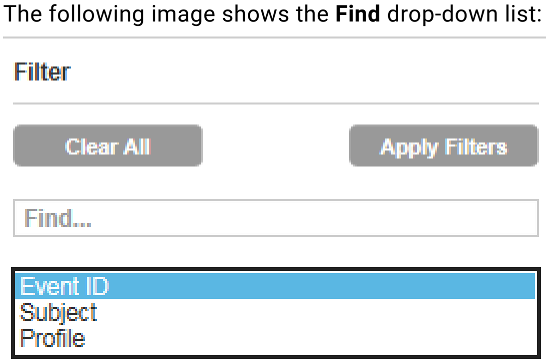
1. In the Filter pane, you can apply one or more filters to the events list.

   The following image shows the Monitoring Events filter:

2. To search for specific text in the event, in the **Find** field, enter the search string as free text. In the drop-down list, select whether the free text applies to a search for an Event ID, subject, or profile name associated with the event.

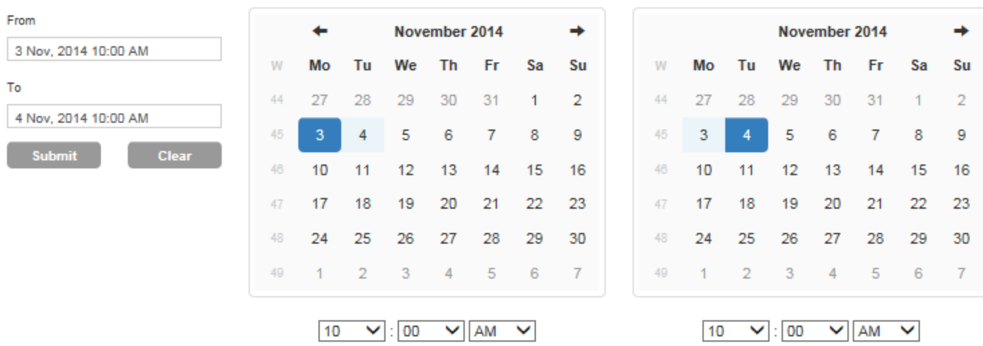
   The following image shows the **Find** drop-down list:

For example, to search per Event ID, type a number into the **Find** field. A search per Event ID is the default selection. The search mechanism is not case sensitive. For a profile name and subject search, events are matched if the search text is a substring of the text. For an Event ID search, the Event ID must be an exact match. For example, if you search for 109, the search does not retrieve 1090. A subject search might take more time than other searches.

3. To search for specific time frame, select the time frame in the **Time** field. To search for a custom time, select **Custom time frame**. Click in the field that displays the date.

   The **Custom time frame** selector is displayed. The following image shows the **Custom time frame** selector:

   Select the start time and date and end time and date. If you select a From Date that is later than the To Date, the time frame setting reverts to the previous setting.

4. To search and show child events, select the **Show child events** check box.
5. You can apply one or more filters to the event. For example, to search for specific events, you can filter according to time frame, event status, and account.
6. To perform the search, click **Apply Filters**.

   The Monitoring Events tab displays the list of events that match the search criteria.

7. To clear your filter selections, click **Clear All**.

   The Monitoring Events tab displays all the events in the last 24 hours.

Monitoring Events Filter Properties

You can apply a filter to the events list to focus on a specific time period, event type, event status, aggregated status, reconciliation status, or account, or any combination of these.

The following table describes the properties that you can use to filter the Monitoring Events tab:

Filter	Description
Accounts	Related account for the events.
Aggregated Status	Indicates the overall state of message processing. When an event has child events, for example when a file contains several transactions, the aggregated status indicates the status of all the child events. The Aggregated Status property has the following status options and icons: - Delayed: Assigned when child events have a Delayed status. This occurs if the processing for child messages is delayed due to processing rules, or if the processing for child messages waits for a processing rule to release the message, or if the processing for child messages waits to be manually released. - Error: Assigned when the child events have an error status. This happens when child event processing produces an error. - Final: Assigned when the child events have a Final status after processing finalizes. - In Process: Assigned while the child events have a Pending status, as the child events are still processing. You can also select the following options: - All Aggregated Statuses: Show all events with an aggregated status. - None: Shows all events that do not have an aggregated status.
Event ID	Unique identifier for the event.
Event Status	Status of the event. The Event Status property has the following status options: - All Event Statuses - All Error Statuses - All Final Statuses - Complete - Critical - Delayed - Discarded - Error - New - Pending - Pre-Processing (only relevant to B2B Data Integration Hub) - Processing (only relevant to B2B Data Integration Hub) - Rejected - Reprocessed - Successfully Completed - Transferring - Warning **Note:** The Event Status property might display other customized options that the B2B Data Exchange organization administrator created to address specific tracking needs. **Note:** Some Event Status options are only relevant to B2B Data Integration Hub and are not used by B2B Data Exchange.

Filter	Description
Event Type	Type of the event. The Event Type property has the following type options: - Aggregated Subscription (only relevant to B2B Data Integration Hub) - All - Compound Subscription (only relevant to B2B Data Integration Hub) - Custom Event - File Event (only relevant to B2B Data Integration Hub) - File Level Event - Functional Subscription (only relevant to B2B Data Integration Hub) - Group Level Event - Publication (only relevant to B2B Data Integration Hub) - Segment Level Event - System Event - Subscription (only relevant to B2B Data Integration Hub) **Note:** The Event Type property might display other customized options that the B2B Data Exchange organization administrator created to address specific tracking needs. **Note:** Some Event Type options are only relevant to B2B Data Integration Hub and are not used by B2B Data Exchange.
Profile	Profile name associated with the document processing workflow. A profile defines how to process a document for a partner or an account.
Reconciliation Status	Status of a reconciliation associated with processing the message. You can choose one of the following options: - After Timeout - All Reconciliation Statuses - Complete - None - Pending - Timeout
Show child event	An event can be associated with one or more related sub-events. If selected, child events are also displayed in the Monitoring Events list.
Subject	Attribute that is commonly used to describe important processing information.
Time	Time period during which the event were created. You can choose one of the following options: - All - Custom Time Frame - Last hour - Last two hours - Last 24 hours - Last 7 days - Last 30 days - Today - Yesterday

CHAPTER 4

On-boarding

This chapter includes the following topics:

On-boarding Overview

On-boarding is the process by which a partner configures their document communications with the B2B Data Exchange organization, which allows partners to send and receive messages with B2B Data Exchange.

Partners can use the Partners Portal to configure their settings for B2B Data Exchange. Partners can view and update their B2B Data Exchange message profiles. If communication with the organization is done with FTP or FTPS, partners can view the organization configuration settings and configure their FTP software in accordance with the organization configuration.

Partner on-boarding is implemented with a message-profile wizard accessed in the Message Profile tab. The message-profile wizard contains the message profile and workflow parameter settings that complete the on-boarding process.

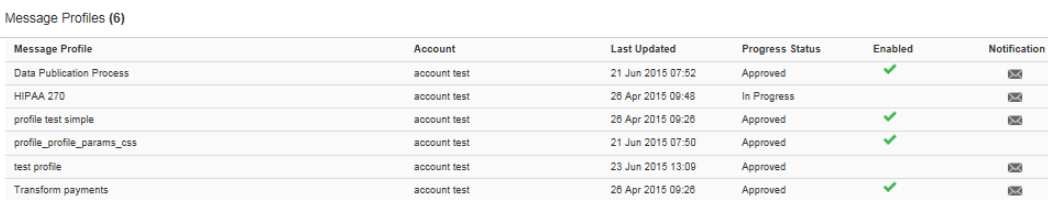
When you update the message profile, B2B Data Exchange sends the changes to the organization operator for approval. The Message Profile tab shows the approval status in the **Progress Status** column of the tab. The changes do not take effect until the organization operator approves them.

Partners can use the Endpoint form accessed in the Endpoint tab to view information about communication endpoints with the organization. The Endpoint form provides details regarding the selected endpoint. For an FTP or FTPs endpoint hosted at the B2B Data Exchange organization, use the Endpoint form to change the FTP\FTPs password for the endpoint.

Message Profiles

The B2B Data Exchange organization administrator assigns message profiles to a partner. A message profile defines how to process a document for a partner to meet the specific needs of the partner. The profile associates a partner with a workflow that defines document processing and relevant requirements. You can use the **Message Profiles** tab to view and edit your message profile settings for B2B Data Exchange.

The following image shows the **Message Profiles** tab:



Message Profiles **(6)**

Message Profile	Account	Last Updated	Progress Status	Enabled	Notification
Data Publication Process	account test	21 Jun 2015 07:52	Approved	✓	✉
HIPAA 270	account test	26 Apr 2015 09:48	In Progress		✉
profile test simple	account test	26 Apr 2015 09:26	Approved	✓	✉
profile_profile_params_css	account test	21 Jun 2015 07:50	Approved	✓	
test profile	account test	23 Jun 2015 13:09	Approved		✉
Transform payments	account test	26 Apr 2015 09:26	Approved	✓	✉

The Message Profiles tab shows profiles in alphabetical order. To sort the profiles, click the title of the column that you want to sort.

To edit profile settings and perform on-boarding, click the profile to open the Message Profile wizard.

Message Profile Properties

The Message Profile tab contains properties based on the message profile settings and status.

The following table describes the Message Profile properties:

Panel	Description
Account	Name or identifier of the related account. An account generally represents a department or function in the partner company.
Enabled	Specifies whether the message profile is enabled or disabled.
Last Updated	The time that the message profile was updated.
Message Profile	Name or identifier of the message profile. A message profile determines the B2B Data Exchange communications workflow with the organization.
Notification	Comment that the B2B Data Exchange administrator provided when approving or rejecting changes to the message profile.
Progress Status	When you submit updates to the message profile settings with the wizard, B2B Data Exchange sends the changes to the organization operator for approval. The Progress Status property displays the approval status. Changes do not take effect until the organization operator approves them. You can save the changes without submitting changes for approval. The Progress Status property has the following status options: - New: The operator created a message profile, and the portal user has not edited the profile. - In Progress: The portal user is editing the profile but did not submit the changes, or the changes were submitted but rejected by the B2B Data Exchange operator. - Waiting for Approval: The portal user edited the profile and submitted the changes, but the operator did not yet approve the changes. - Approved: The operator approved the changes to the profile.

The Message Profile tab displays profiles in chronological order according to the date that they were created or updated.

Refreshing the Message Profiles

To view the latest profiles, you can refresh profiles in the Message Profiles tab.

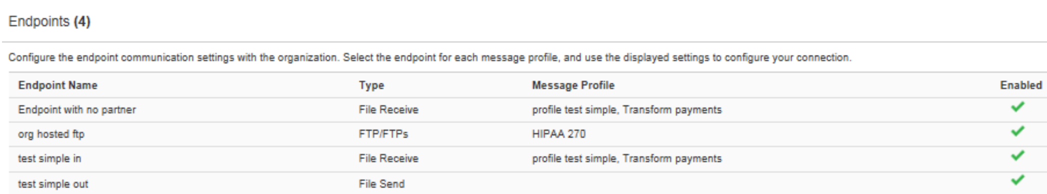
▶ To refresh the profiles in the Message Profiles, click the refresh icon .

The profiles list is updated with the latest profiles.

Endpoints

Endpoints are points of entry or exit for documents in B2B Data Exchange. Endpoints specify how and where B2B Data Exchange sends and receives documents. The B2B Data Exchange organization operator defines endpoints and assigns an endpoint to one or more message profiles. The partner can edit endpoint definitions with the endpoint form as part of the on-boarding process.

The following image shows the Endpoint list:


Endpoints (4)

Configure the endpoint communication settings with the organization. Select the endpoint for each message profile, and use the displayed settings to configure your connection.

Endpoint Name	Type	Message Profile	Enabled
Endpoint with no partner	File Receive	profile test simple, Transform payments	✓
org hosted ftp	FTP/FTPs	HIPAA 270	✓
test simple in	File Receive	profile test simple, Transform payments	✓
test simple out	File Send		✓

To edit endpoint settings and perform on-boarding, click the endpoint to open the on-boarding form.

Endpoint Properties

The Endpoint tab contains properties based on the communication settings and status.

The following table describes the Endpoint properties:

Panel	Description
Enabled	Specifies whether the message profile is enabled or disabled.
Endpoint Name	Name or identifier of the endpoint.
Message Profile	Name or identifier of the associated message profile. An endpoint can be associated with several message profiles.
Type	The endpoint type specifies the communication protocol between B2B Data Exchange and the partner.

Performing On-boarding

Use the on-boarding process to enable or disable a message profile and configure additional parameters. After you update message profile settings, B2B Data Exchange sends the updates to the organization operator for approval.

Note: The Partners Portal displays the Dashboard, Events, Message Profiles, and Endpoint tabs according to the permissions assigned to the Partners Portal user, so you might not see all the tabs.

To complete on-boarding, perform the following steps:

1. In the Message Profile tab, use the Message Profile wizard to enable a message profile and configure parameters.
2. In the Endpoints tab, use the Endpoints form to view endpoint settings and configure your system accordingly. For FTP or FTPs endpoints hosted by the organization, you can set the endpoint password.

Step 1. Edit the Message Profile

Use the message profile wizard to enable or disable a message profile and configure additional parameters. After updating the settings, B2B Data Exchange sends the updates to the organization operator for approval.

1. To open the message profile wizard, in the Message Profile tab, select and click a message profile.

   The message profile wizard appears.
2. In the General tab of the message profile wizard, you can view the message profile name and description. Perform the following steps:
   a. Select an account from the account list.

      Note: The B2B Data Exchange Operator might have already selected an account.

   b. To enable the message profile, select **Enable Message Profile**.

   c. To disable the message profile, clear **Enable Message Profile**.
3. Click **Next**.
4. In the Additional Parameters tab of the on-boarding wizard, you can edit custom parameters that the organization operator associated with the message profile. You can edit the parameters to customize message processing to meet your communication needs.

   Note: You cannot update the message profile if you do not assign values to parameters that are mandatory.
5. To return to the General tab, click **Back**.
6. To exit the wizard without updating the message profile settings, click **Cancel**.
7. To save the message profile settings as a draft version without submitting changes for approval, click **Save**.
8. To save changes and update the message profile settings, click **Finish**.

   When you update the message profile settings with the wizard, B2B Data Exchange sends the changes to the organization operator for approval. The changes do not take effect until the organization operator approves them. The Message Profile tab shows the approval status in the **Progress Status** column of the tab.

   Note: To view B2B Data Exchange Operator comments related to a Message Profile, click the Notification icon in the Message Profile tab grid.

Step 2. Edit the Endpoint

Use the Endpoint form to view communication settings. For FTP and FTPs endpoints, you can use the form to define the password for endpoint access if the server is located at the B2B Data Exchange organization and you have change password editing privileges. This ensures that the password with which you configure your FTP or FTPS setup for communication with the organization is the same as the one defined at the organization. The endpoint password cannot be edited for an FTP or FTPs endpoint with LDAP authentication.

1. To open the Endpoint form, in the Endpoint tab, select and click an endpoint.

   The Endpoint form appears. You can view the endpoint name, type, description, file name pattern, and whether the endpoint is enabled. You can view the Connectivity Guide if it had been previously uploaded.

2. You can specify the password for the endpoint communications if the endpoint type is FTP or FTPS. To select a password, click **Change Password**, and then type the password.

   The **Change Password** button is not displayed for other endpoints. If you do not have change password editing privileges, the **Change Password** is disabled.

   Note: When you create a password, it must be in accordance with the password policy created by the B2B Data Exchange organization.

3. In the File Selection Pattern section, you can view file name patterns and regular expressions that are used to select the files that the endpoint routes.

   When the system receives a document that matches the file name pattern or regular expression, it processes the document through the endpoint. The file name pattern can use variables such as `($xxx)` and the asterisk `(*)` wildcard in the file name pattern. For example, the pattern `($filename).in` processes the files with the `.in` extension. The regular expression can contain pattern matching strings and the wildcard, according to the regular expression standards.

4. Click **Close**.

CHAPTER 5

File Exchange

This chapter includes the following topics:

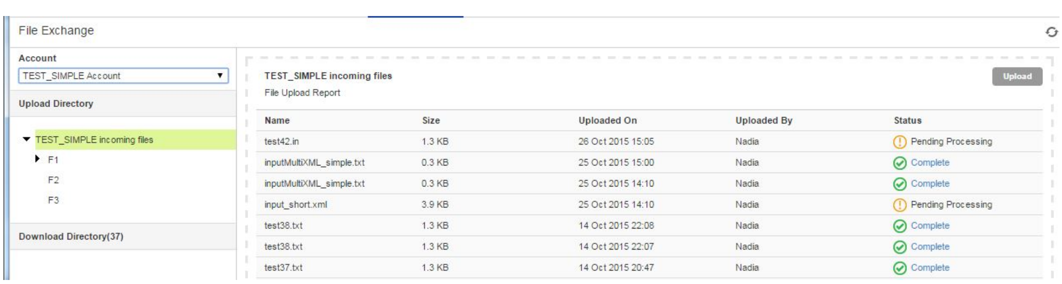
File Exchange Overview

Partners can use the Partners Portal to securely upload and download files for B2B Data Exchange.

You can easily exchange data files, without the need to set up file transfer software on the IT infrastructure. You can view a report of the uploaded files and their processing status, including a link to the corresponding B2B Data Exchange Event. You can also download and delete files sent to you by B2B Data Exchange.

File Exchange Properties

The following image shows the File Exchange tab Upload Directory:



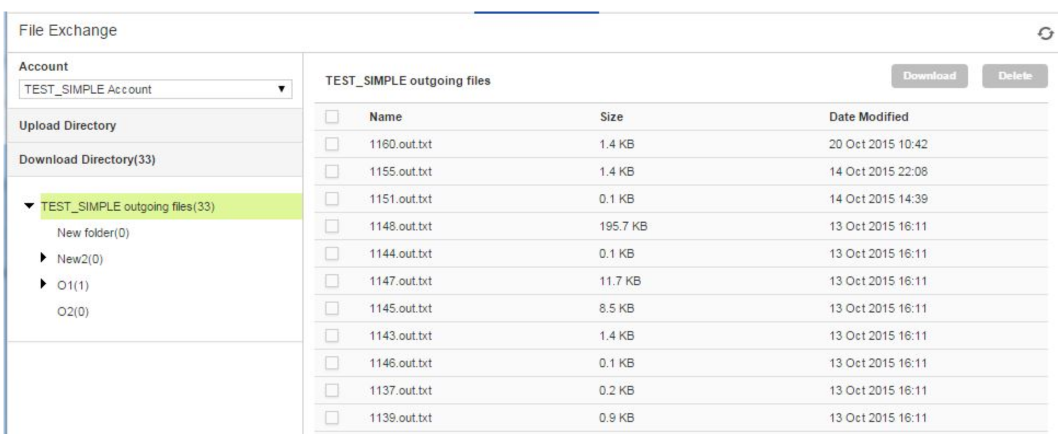
The following table describes the properties of files in the File Exchange Upload Directory:

Panel	Description
Name	File name
Size	File size
Uploaded On	Date and time the file was uploaded to the portal
Uploaded By	Name of user who uploaded the file
Status	Status of the file upload. The following statuses are supported: - Complete - Processing - Pending Processing - Uploading Error - Error

When the status is Complete, Processing, or Error you can click the status to view details of the related upload event.

The following image shows the File Exchange tab Download Directory:

Figure 1.



The following table describes the properties of files in the File Exchange Download Directory:

Panel	Description
Name	File name
Size	File size
Date Modified	Date and time the file was modified

Note: File exchange endpoints must be configured and enabled for the partner. If not, no files will be available and the message " No File Exchange Endpoints are configured for your partner. " will be displayed in the files report pane.

Uploading a File

You can upload your files to the B2B Data Exchange.

Note: The following restrictions apply to the file upload:

- The file name must match the pattern defined for the endpoint associated with the account. If the name does not match the pattern, it will not be processed and the status will remain Pending Processing.
- The file size must not exceed the limit defined in system property dx.portal.upload.size.limit.mb. If the file exceeds that size, it will not be uploaded.
- The file types listed in system property dx.portal.block.upload.file.extensions cannot be uploaded. If the file is one of those types, it will not be uploaded.

To upload your files:

1. Select your Account and Upload Directory in the directory tree from the left pane.
2. To drag files to upload, drag a file or multiple files from your file explorer to the **Drag & Drop to Upload** area.

   The file will be added to the file list with its current status.
3. To select files to upload:
   a. Click **Upload** to open the file explorer.
   b. Select a file or multiple files and click **Open**.

   The files will be added to the file list with its current status.
   While files are uploading, the progress is displayed and you can click on the **X** to abort the upload.

Name	Size	Uploaded On	Uploaded By	Status
mercury_setup.jar	7.2 MB	16% ✖		

Downloading a File

You can download files from the B2B Data Exchange.

1. Select your Account and Download Directory in the directory tree from the left pane.
2. Select a file or multiple files from a outgoing files list.
3. Click **Download**

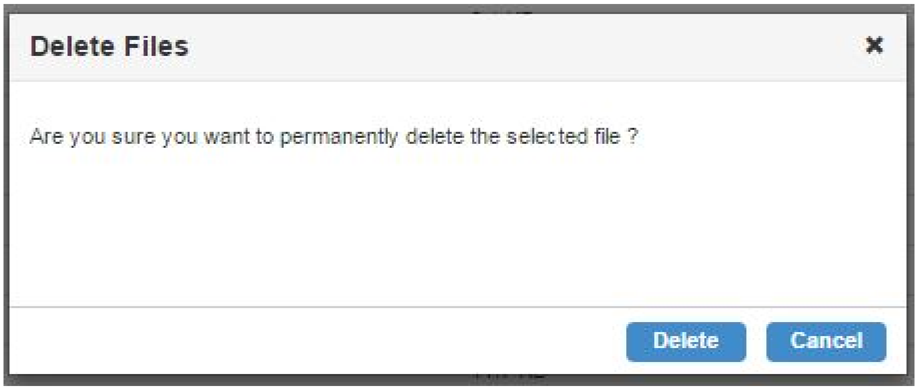
   The files are downloaded. If multiple files were selected, they are downloaded in a zip file.

Deleting Files from File Exchange

You can delete files from the B2B Data Exchange Download Directory.

1. Select your Account and Download Directory in the directory tree from the left pane.
2. Select a file or multiple files from a Download Directory file list.
3. Click **Delete**.

The following confirmation box appears.



4. Click **Delete**.

   The files are removed from the B2B Data Exchange.

Refreshing the File Exchange

To view the latest Upload Directory or Download Directory files, you can refresh files in the File Exchange tab.

▶ To refresh the Upload Directory or Download Directory files in the File Exchange, click the refresh icon .

The files list is updated with the latest files.

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