Informatica® Cloud B2B Partners Portal
Fall 2020 October.- -

B2B Partners Portal

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Preface

As a B2B Partners Portal user, use *B2B Partners Portal* to learn how to view and monitor file events for files that you exchange with the portal provider and how to exchange files with the portal provider through the portal over HTTPS. As a B2B Gateway administrator, use *B2B Partners Portal* to learn how to update portal settings and how to enable access to B2B Partners Portal for trading partners.

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The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at https://www.informatica.com/services-and-training/support-services/contact-us.html.

CHAPTER 1

Introducing B2B Partners Portal

B2B Partners Portal is one of the services available in Informatica Intelligent Cloud Services.

B2B Partners Portal allows organizations that use Informatica Cloud B2B Gateway to share information and files with their trading partners. It allows trading partners to monitor file events for messages and files that they exchange through B2B Gateway.

Two types of users use B2B Partners Portal:

B2B Partners Portal user

A trading partner that uses B2B Partners Portal to monitor file events and view information about each message and to exchange files with the portal provider over HTTPS.

Access to B2B Partners Portal is given by your portal provider.

For more information about using B2B Partners Portal, see Chapter 2, "Using B2B Partners Portal" on page 7.

B2B Partners Portal provider

An Informatica Cloud B2B Gateway administrator who sets up B2B Partners Portal and enables trading partners access to the portal.

If your organization uses B2B Gateway, enable trading partners access to B2B Partners Portal so that your partners can track and monitor file events and exchange files with your organization over HTTPS. When you send and receive files with B2B Gateway, your trading partners can view the status of each file event in B2B Partners Portal.

For information about managing your Informatica Intelligent Cloud Services organization's B2B Partners Portal, see Chapter 3, "B2B Partners Portal administration" on page 12.

CHAPTER 2

Using B2B Partners Portal

As a B2B Partners Portal user, B2B Partners Portal enables you to view information about the messages that you exchange with the portal provider and to exchange files with the portal provider over HTTPS.

The portal provider creates an Informatica Intelligent Cloud Services account for you and enables access to B2B Partners Portal. After you confirm your account, you can log in to Informatica Intelligent Cloud Services and open B2B Partners Portal.

If you are unable to access B2B Partners Portal when you log in, contact the Informatica Intelligent Cloud Services administrator of the portal provider.

Home page

The B2B Partners Portal **Home** page shows an overview of file events and messages that you exchange with the portal provider.

The **Home** page presents events by status. By default, the page shows events for the current day. You can filter the information on the **Home** page to see all events or events for a date range of up to seven days.

The following image shows a sample **Home** page:
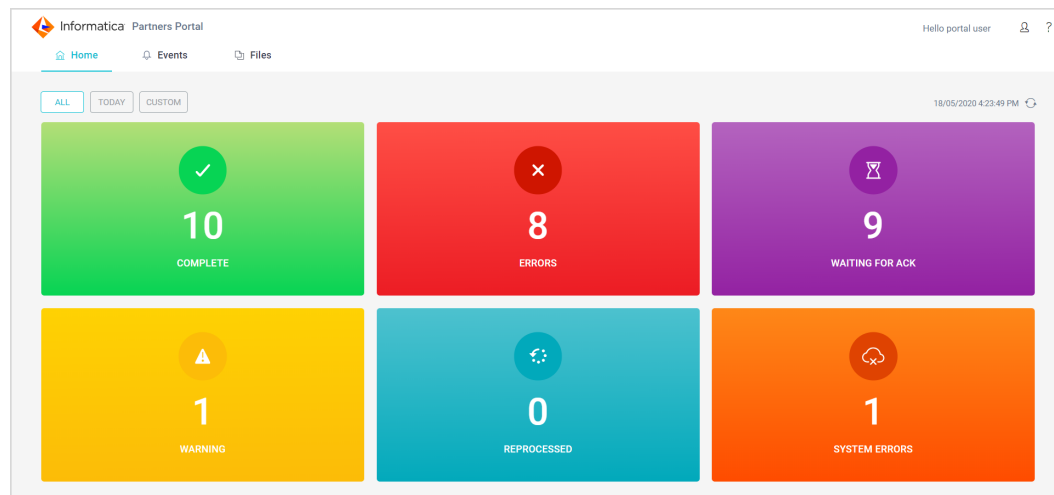
File events

View and track file events on the **Events** page. A file event shows the status of a file. Informatica Intelligent Cloud Services creates a file event for every file that you exchange with the portal provider.

The **Events** page displays detailed processing information for every file that your company exchanges with the portal provider.

Clicking an EDI file event downloads the file that created the event. Clicking the information icon next to an EDI file event opens the event page, with additional details about the event.

The following image shows a sample **Events** page:
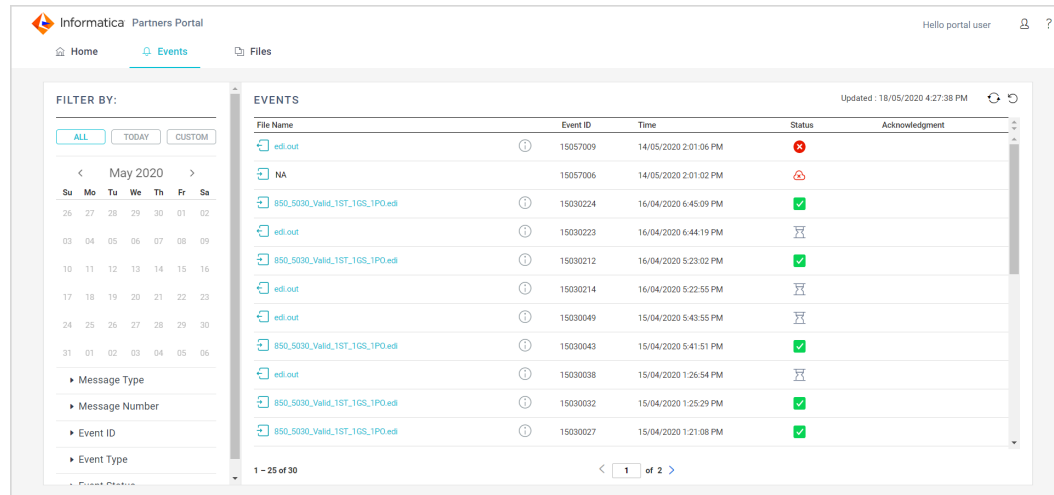
The **Events** page displays the following properties for each file event:

Property	Description
File Name	Name and type of file, inbound or outbound. Click the file name to view the file details.
Event ID	Identifier for the event associated with the file.
Time	Date and time that the event occurred.

| Property	Description
Status	Status of the event. An event can be in one of the following statuses: - Complete. File processing completed successfully. - Error. An error occurred during processing. - Warning. The event generated a warning. - Reprocessed. The event was reprocessed and another event was generated to reflect the new process. - System error. A system error that is unrelated to file processing occurred. - Waiting for Acknowledgment. Receipt of the message has not been acknowledged. - Transferring files. Files are transferring. - Discarded. The event status was manually changed to discarded. Discarded events are read-only and cannot be handled any further. - Processing. The file is currently being processed.
Acknowledgement	Applies to EDI messages. Acknowledgement type. Can be one of the following types: - TA1 - 997 - CONTRL You can view the acknowledgment file by clicking the link.

Information on the **Events** page can become out of date. To update the information on the page, click the

refresh icon ⟳. To restore the default view, click the restore defaults icon ↺.

Filtering the events page

Use the filters on the left side of the **Events** page to find specific file events. By default, the **Events** page shows information for the current day.

You can apply the following filters:

Filter	Description
Date	Select to view all events or a range of up to seven days.
Message Type	Select any message type that you exchange with your partner.
Message Number	Enter a search string.
Event ID	Enter a search string.
Event Type	Select an event type.
Event Status	Select a status.

To remove filters, click **Restore Defaults** at the top right of the page.

Viewing message details for a specific event

To view details about a specific event, click the information icon next to the event. When you drill down on an EDI file event, you see further details about the messages in the file.

The message details page displays the following properties for each event:

Property	Description
Message Type	Type of message.
Message Number	Unique identifier for the message.
Number of Rows	Number of rows in the message.
Group Control Number	Control number for the functional group.
Message Control Number	Control number for the transaction.
Event ID	Unique identifier for the event associated with processing the EDI group.
Status	Status of the event. An event can be in one of the following statuses: - Complete. File processing completed successfully. - Error. An error occurred during processing. - Warning. The event generated a warning. - Reprocessed. The event was reprocessed and another event was generated to reflect the new process. - System error. A system error that is unrelated to file processing occurred. - Waiting for Acknowledgment. Receipt of the message has not been acknowledged. - Transferring files. Files are transferring. - Discarded. The event status was manually changed to discarded. Discarded events are read-only and cannot be handled any further. - Processing. The file is being processed.
Message File	XML file for the message. Click the file icon to view the file.
Acknowledgment	Applies to EDI messages. Acknowledgement type for inbound messages. Can be one of the following types: - TA1 - 997 - CONTRL

File download and upload

You can use B2B Partners Portal to exchange files with the portal provider over an HTTPS server.

You can exchange files over an HTTPS server if the following conditions exist:

- The portal provider enables the feature for you.

- You receive a certificate from the portal provider and upload the certificate to the browser.

To receive files from the portal provider, download files that the portal provider uploads to the portal. To send files to the portal provider, upload the files to the portal.

You download and upload files on the **Files** page, on the **Files for Download** area. You can view and track all the files that are available for download and upload on the **All Files** area. The following image shows a sample **Files** page:
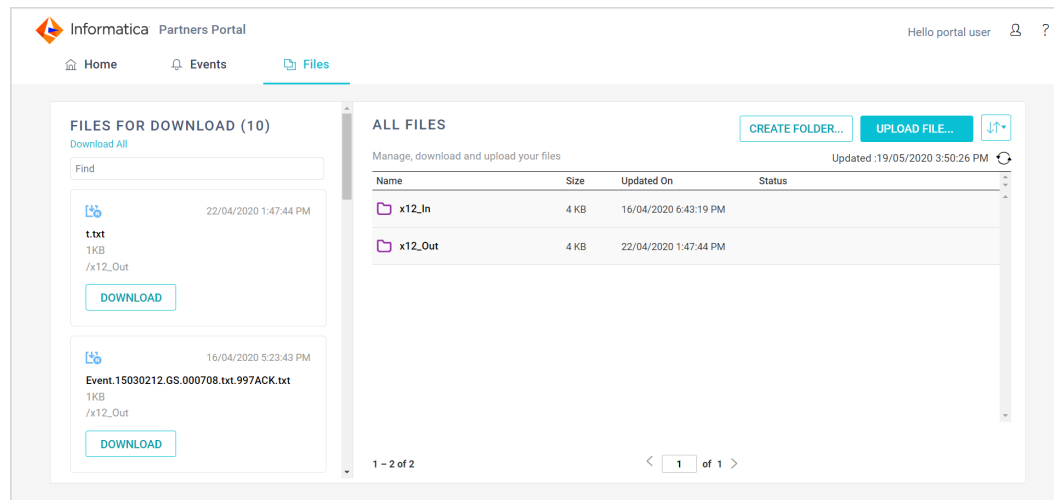
Downloading files from the portal

Download files that the portal provider uploaded to the portal on the **FILES FOR DOWNLOAD** pane of the **Files** page.

▶ Perform one of the following actions:

- To download all the files that are available for download, click **Download All**, select the download location, and click **Save**.
- To download a single file, perform the following actions:
   1. If the file is stored in a folder, select a folder to download the file from.
   2. Click **DOWNLOAD** below the file name, select the download location, and click **Save**.

Uploading files to the portal

Upload files to send files to the portal provider to the portal on the **ALL FILES** pane of the **Files** page.

Before you upload files, you can create a folder to upload the files to.

1. Optionally, click **CREATE FOLDER** to create a folder to upload files to.
2. To upload a file to a specific folder, select the folder.
3. Click **UPLOAD FILE**, select the file, and click **Open**.

B2B Partners Portal administration

To enable trading partners to use B2B Partners Portal and to customize the portal, perform tasks in Administrator and in B2B Partners Portal.

In Administrator, set up partner users and roles. In B2B Partners Portal, set up partners for portal access.

To perform the required tasks in Administrator, log in with a user that has a user role with the following privileges:

| Service	Privileges
Administrator	Read privilege for the Privilege, Role, and User assets
B2B Partners Portal	Portal Setup feature privilege

Perform the following tasks:

- Create a custom role for partner users. Assign the role only the Partners Portal feature privilege in the B2B Partners Portal service. For more information, see the Administrator help.

- Create an Informatica Intelligent Cloud Services user for each user in the partner company, and assign each user the partner users custom role.

- Configure partner access to the portal. Add the partner to the portal, and assign portal users to the partner.

- Optionally, customize the portal so that your organization name and logo appear when your partners log in. You can also view data about your partner users.

- Optionally, enable file exchange over HTTPS through the portal.

Note: Before you can access B2B Partners Portal, the organization must be set up in Informatica Intelligent Cloud Services and in B2B Gateway. For more information, see the B2B Gateway help.

Portal partners

The **Portal Partners** tab shows a list of partners that have access to B2B Partners Portal and the portal users and HTTPS users that are associated with each partner.

The following image shows the **Portal Partners** tab:
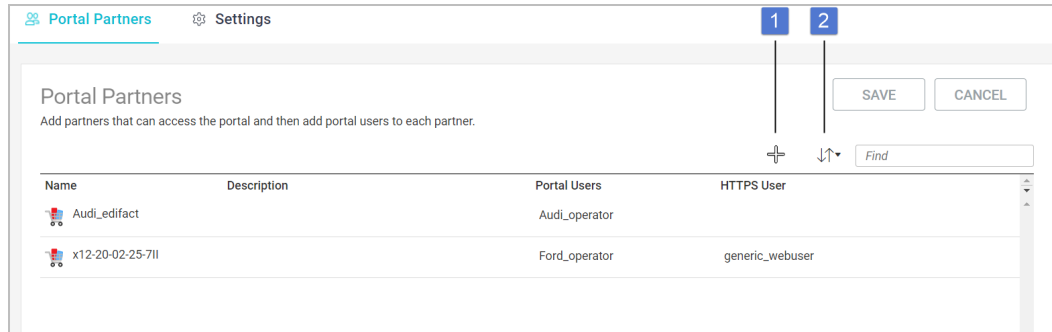
1. Add Partner.
2. Sort.

B2B Partners Portal users

You create an Informatica Intelligent Cloud Services user for each user from your partner organization who will use B2B Partners Portal.

You create and mange users in Administrator. Each B2B Partners Portal user is a user in your Informatica Intelligent Cloud Services organization. Assign this user the custom role for access to B2B Partners Portal.

Your partner will receive an email prompting them to confirm their Informatica Intelligent Cloud Services account.

If your organization has licenses for multiple services in Informatica Intelligent Cloud Services, you might want to disable all services except for B2B Partners Portal for trading partners users. For information about disabling services, see *Administrator* in the Administrator help.

You manage B2B Partners Portal users in the same way that you manage your Informatica Intelligent Cloud Services organization users.

For more information about managing users, see *Administrator* in the Administrator help.

Configure partner access to B2B Partners Portal

To allow your partners to access B2B Partners Portal, add your trading partners to B2B Partners Portal, and add portal users to each partner.

Before you add partners and users for B2B Partners Portal, ensure that the following requirements are met:

- The partner that you want to grant access to is configured in B2B Gateway.

- A role for B2B Partners Portal users is created in Administrator. The role must have the Partners Portal feature privilege in the B2B Partners Portal service. For information about creating user roles, see *Administrator* in the Administrator help.
- A user exists in Administrator for each user from your B2B Gateway partner company who will access the portal, with the role for B2B Partners Portal.

Adding partners to B2B Partners Portal

Add your B2B Gateway partners to B2B Partners Portal so that the partner file event information appears in B2B Partners Portal.

1. In B2B Partners Portal, on the **Portal Partners** tab, click the **Add Partner** icon.

   The **Add Partner** window appears.

2. Select the partners that you want to add to your B2B Partners Portal.

3. Click **Add**.

   The partners are added to the **Portal Partners** area.

After you add a partner to the portal, you must add at least one portal user to the partner.

Adding portal users to partners

Associate your partners' portal users with your B2B Gateway partners in B2B Partners Portal. A portal user is an Informatica Intelligent Cloud Services user that you create for each member of your partner companies who will use B2B Partners Portal.

When a portal user logs in to B2B Partners Portal, they see event information for the partner company that their user account is associated with. Each partner in your B2B Partners Portal must have at least one portal user associated with it.

A portal user cannot be associated with more than one partner.

1. In B2B Partners Portal, on the **Portal Partners** tab, in the row that contains the partner, click **Actions** and select **Add Portal User**.

2. Select the users to add to the partner.

   You can add multiple users to each partner.

3. Click **Add**.

4. Click **Save**.

Customizing the portal

Customize your B2B Partners Portal with your organization name and logo. When your partners log in to B2B Partners Portal, your organization name and logo appear in the upper left corner of the screen.

You can customize the portal name, the logo, or both.

The logo must meet the following requirements:

- File type: SVG, PNG, JPG, or GIF. The recommended file type is SVG.
- File size: no bigger than 1 MB.

The recommended file size is 55 pixels high and 135 pixels wide.

1. In B2B Partners Portal, select the **Settings** tab.
2. Perform the following actions and then click **Save**:
   - To customize the portal name, enter the new name in the **Partners Portal** field.
   - To customize the portal logo, in the portal logo area, click **Browse** and select the logo file. To revert to the Informatica logo, click **Reset to Default Logo**.

Enable file exchange through B2B Partners Portal

Enable your partners to exchange files with your organization through B2B Partners Portal.

You exchange files with partners through the portal over HTTPS. File exchange through the portal over HTTPS enables partners to upload files to your HTTPS server and to download files that you upload to your HTTPS server for the partner.

Before you enable file exchange over HTTPS through the portal, ensure that the following requirements are met:

- The HTTPS file server to use to exchange files is configured in Administrator.
- SSL is enabled for the HTTPS server.
- An HTTPS server user is defined and associated with each partner that you want to exchange files with through the portal.

For information about configuring file servers and file server users, see *File transfer* in the Administrator help.

To enable file exchange through the portal, perform he following tasks:

- Configure the HTTPS server on the portal.
- Send a server certificate to the portal user and instruct them to upload the certificate to the browser.

Configuring the HTTPS server

Configure the HTTPS server to use to exchange files.

1. In B2B Partners Portal, select the **Settings** tab.
2. Enter the server URL or proxy server URL in the **HTTPS Server** area and click **Save**.

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