



Informatica® Cloud B2B Gateway  
October 2025

# B2B Gateway

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# Preface

Use *B2B Gateway* to learn how to exchange Electronic Data Interchange (EDI) messages with business trading partners using Informatica Intelligent Cloud Services B2B Gateway. Learn how to set up and configure partners, create mappings to move files, and track and monitor file events. You can also learn how to enable access to B2B Partners Portal for your trading partners.

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## CHAPTER 1

# Introducing B2B Gateway

B2B Gateway simplifies the order-to-cash and procure-to-pay cycles and reduces the cycle time with end-to-end processing and handling of the exchange of Electronic Data Interchange (EDI) messages with your partners, including the X12 and EDIFACT EDI standards. If any of your partners do not use EDI, you can use B2B Gateway to exchange any other type of file, for example, CSV, XML, or Excel files.

Informatica Cloud B2B Gateway is one of several services available in Informatica Intelligent Cloud Services. When you log into Informatica Intelligent Cloud Services, the My Services page displays the B2B Gateway service and services that apply to partner management. The My Services page might also include other services that you subscribe to and trial versions of other services.

The following services apply to B2B Gateway:

- **Data Integration.** Manage data integration projects and create assets such as mappings to move your files to and from your backend system.
- **Administrator.** Perform administrative tasks such as creating users and managing privileges, downloading Secure Agents and configuring runtime environments, configuring connections, managing licenses, and creating schedules.
- **Monitor.** Check the status of imports and exports that are in progress and imports and exports that have completed.
- **B2B Partners Portal.** Extend tracking and monitoring capabilities to your trading partner companies. Trading partners use B2B Partners Portal to track and monitor file events for the messages that they exchange with your organization.

## B2B Gateway overview

Use B2B Gateway to streamline and automate order-to-cash and procure-to-pay processes with your trading partners.

B2B Gateway uses Data Integration mappings to process and exchange messages and files between the organization and its partners. To simplify EDI message handling, B2B Gateway includes pre-packaged, EDI processing mappings that validate and handle the EDI messages and convert EDI messages from partners to XML interface files, which you can then process and move from the gateway to the backend systems.

When partner EDI messages arrive, B2B Gateway receives and validates the messages and sends functional and technical acknowledgments to the partners. To process the messages to the backend systems, you can create Data Integration mappings.

To send EDI messages to partners, you create Data Integration mappings that extract the information from the backend systems, write the information to the interface files, and move the files from the backend system to the gateway. The gateway enriches the data in the interface files with metadata from the gateway, creates

a valid EDI message file for each interface file, and sends the message files to the partners. You can ask to receive acknowledgments from the partner. For EDI X12 messages, the gateway tracks all the acknowledgments that the partner sends.

B2B Gateway can also process non-EDI files. For custom, non-EDI files, you create the mappings that process the files for all the stages of the order-to-cash and procure-to-pay processes. For the exchange of custom files with your partners you can use any type of file as the interface file.

For inbound Excel, TXT, and CSV files, instead of creating custom mappings to process the incoming files, you can use Informatica Intelligent Structure Discovery to automatically discover the file structure and create CSV interface files. You can then create custom mappings that process the data to your backend system.

B2B Gateway generates events as it processes messages and files, to help you track and monitor the data that you exchange with partners. The event list provides full visibility into the data exchange and alerts you to errors that might occur.

### Order-to-cash example

You are a supplier that receives purchase orders from a retail chain. Message exchanges between you and the retail chain can include sending and receiving messages, for example, receiving purchase orders and payment or order remittance advices and sending functional acknowledgments and invoices.

### Procure-to-pay example

You place orders with an Internet supplier. Message exchanges between you and the supplier can include sending and receiving messages, for example, sending purchase orders and payment or order remittance advices and receiving purchase order acknowledgments and invoices.

### Data exchange setup

To set up the data exchanges with the retail chain and the Internet supplier, you perform the following tasks:

1. In B2B Gateway, create a new customer for the retail chain.
2. Define the type of messages that you exchange with the customer and the communication protocols through which you exchange data with the customer, select whether to send functional acknowledgments, assign mappings to the inbound and outbound flows as applicable, and define messaging schedules.
3. If you want B2B Gateway to process inbound messages from the gateway to the backend system, create a Data Integration mapping where B2B Gateway is the source and the backend system is the target. In B2B Gateway, in partner management, select the mapping as the process-to-backend mapping.
4. For outbound messages, create a Data Integration mapping where the backend system is the source and B2B Gateway is the target. You create a mapping that handles all message types and versions that you send to the customer. In B2B Gateway, in partner management, select the mapping as the process-from-backend mapping.
5. Save the new customer.
6. Create a new supplier for the Internet supplier.

## Partners

The organization partners are customers that place orders with the organization and suppliers with which the organization places orders.

A partner can be either a customer or a supplier.

When you define a partner in B2B Gateway, you define the details of your exchanges with the partner as agreed upon between you and the partner. Exchange details include the type of messages that you exchange with the partner, the communication protocols through which you exchange data with the partner, whether or not you send functional and technical acknowledgments to the partner, the mappings that you use for inbound and outbound flows, as applicable, and the messaging schedules.

You can choose to send acknowledgements for all messages or individual message types.

To send acknowledgements for all the messages, select the **Send functional acknowledgment** option on the **Outbound Acknowledgment** tab.

To send acknowledgements for individual message types, select one of the following options on the **Messages** tab:

- **Default.** Select this option to send acknowledgements for all the messages by configuring the **Send functional acknowledgment** option.
- **Yes.** Select this option to send acknowledgements for the respective message type.
- **No.** Select this option if you don't want to send acknowledgements for the respective message type.

## Inbound and outbound flows

For each partner, you can define an inbound flow, an outbound flow, or both.

When you define an inbound flow, B2B Gateway uses the flow details to handle incoming messages and files and to send acknowledgements in response. When you define an outbound flow, B2B Gateway uses the flow details to handle outgoing messages and files.

When you define an inbound or an outbound flow, you configure a connection, select the mappings, and select a schedule for the flow.

If you select the file servers connection type for a flow, you can also select a file transfer task to decrypt or decompress inbound files or to encrypt or compress outbound files that you exchange with your partner.

## Outbound acknowledgement configuration

Use the **Outbound Acknowledgement** page of the partner wizard to define the outbound acknowledgement for the partner.

The **Outbound Acknowledgement** page includes the following properties for EDI X12 and EDIFACT messages:  
**Send functional acknowledgment**

Select the **Send functional acknowledgment** option to send acknowledgements for all the messages. B2B Gateway generates and sends acknowledgments to the partner upon receiving and processing messages. This option is selected by default.

**Send acknowledgment to default location**

Select the **Send acknowledgment to default location** option to send acknowledgments to a default location. This option is selected by default.

If you clear this option, you can manually enter the connection type, connection, target directory, and file pattern.

**Connection Type**

Select the type of the connection to where B2B Gateway sends the outbound acknowledgment files. You can select the following connection types:

- Advanced FTP V2
- Advanced FTPS V2
- Advanced SFTP V2
- AS2 Client
- File Servers (AS2, HTTPS, SFTP)
- Local Folder/MFT

**Connection**

Connection where B2B Gateway creates outbound acknowledgment files for the partner. Applies to the Advanced FTP V2, Advanced FTPS V2, Advanced SFTP V2, and AS2 client connection types.

You configure connections in Administrator. For information about configuring the connections, see the *Administrator* help.

**Target Directory**

Path to the directory on the connection where B2B Gateway drops outbound acknowledgment files.

**File Pattern**

Select the outbound acknowledgment file name pattern.

For example:

```
($eventId).edi
```

The patterns are not case sensitive. For more information about the file patterns that you can use in the outbound acknowledgement definition, see [“File Patterns” on page 32](#).

## Data Integration mappings

B2B Gateway uses Data Integration mappings to process EDI messages and custom files that you exchange with your partners.

If system resources are limited, you can select to minimize the number of process-to-backend mappings for your organization. For all the XML interface files created during a single inbound processing flow for an EDI X12, EDIFACT, or custom file, B2B Gateway can group the process-to-backend mappings into a single mapping.

If no files are found in a source directory for an inbound message flow, processing is not triggered and the mapping doesn't run.

# Schedules

Define schedules to run partner inbound flow, outbound flow, or both.

Create schedules in Administrator. For information about defining schedules, see *Schedules* in the Administrator service help.

To create, define, and update schedules for partner flows, users must have the appropriate privileges for Schedule and Schedule job. For more information about user privileges, see the Administrator help.

# File listeners

Create file listeners to trigger inbound and outbound flows when files arrive in a specific folder. A file listener listens to files in a specific location and can notify subscribing applications when files arrive at the location or when files in the location are updated or deleted.

You choose the file listener to trigger the partner flow in the Schedule pane of the Inbound and Outbound partner properties windows.

The file listener creates a job when the file listener starts. It lists the job instance on the File Transfer Logs page in Monitor. The file listener job details appear in the file listener job properties. For more information about monitoring file listener jobs, see the Monitor help.

A file listener that is not used by an asset is not active and does not listen to the defined folder.

Create file listeners in Data Integration. For more information about creating file listeners, see *Components* in the Data Integration help.

To create and use file listeners, users need the appropriate privileges for File Listener. For more information about user privileges, see the Administrator help.

# EDI and EDIFACT messages

B2B Gateway uses Data Integration mappings to validate and handle EDI and EDIFACT message exchanges between the organization and its partners.

When you exchange EDI and EDIFACT messages with your partners, B2B Gateway creates EDI processing mappings in Data Integration to exchange and process messages between partners and B2B Gateway. You create custom mappings for data transfer between B2B Gateway and the backend system.

# Custom files with custom mappings

For partners that do not use EDI, you can use B2B Gateway to validate and handle exchanges of any type of file between the organization and the partners.

To exchange custom files with partners you create custom Data Integration mappings.

To simplify the handling for incoming Excel, TXT, and CSV files, you can use Informatica Intelligent Structure Discovery to automatically discover file structures and create an interface file. Intelligent Structure Discovery uses artificial intelligence to automate structure discovery for files that do not follow industry standards.

## Inbound custom files with Intelligent Structure Discovery

For inbound Excel, TXT, and CSV files you can use Informatica Intelligent Structure Discovery to automatically discover the file structure.

Intelligent Structure Discovery creates CSV interface files on the B2B Gateway document store. You can then define a custom mapping to process the data from the document store to the backend system.

Using Intelligent Structure Discovery for an inbound partner flow eliminates the need to create an inbound custom mapping for the flow.

## Custom event status management

In B2B Gateway, you can create and manage custom event statuses in the **Events > Events Status** page. You can manage a custom event status to indicate the progress of an event while B2B Gateway processes it.

You can update the custom event status for custom file type events at run time using the B2B transformation that is available in the mappings of Data Integration. Using the B2B transformation, you can either pass the event status as a parameter or select an event status name that is configured in B2B Gateway.

For more information about using the B2B transformation in a Data Integration mapping, see the *Data Integration* help.

You can create, edit, and delete a custom event status.

### Creating a custom event status

Use the Navigator in B2B Gateway to create custom event statuses. The custom event status appears with a hyperlink on the **Event Status** page. You can click the hyperlink to view the details of the custom event status.

1. In the Navigator, click **Events > Event Status**.  
The **Event Status** page appears.
2. To create a custom event status, click **Create Event Status**.  
The **New Event Status** page appears.
3. Define the following custom event status properties:
  - **Event Status Name.** Enter a unique name for the event status.
  - **Icon.** Select an icon to represent the event status.



- **State.** Select the state of the event status that will determine how B2B Gateway processes a custom event.
    - **Error.** Select this option to denote that issues exist in the partner flow and you do not want to end the process.
    - **Final.** Select this option to end the process.
4. Click **Save**.

## Managing a custom event status

Use the Navigator in B2B Gateway to update or delete a custom event status.

1. In the Navigator, click **Events > Event Status**.  
The **Event Status** page with a list of pre-defined and custom event statuses appears.
2. To edit an event status, click the **Edit** icon next to the event status that you want to edit and change the event status properties on the **Edit Event Status** page.
3. Define the following event status properties:
  - **Event Status Name.** Enter an unique name for the event status.
  - **Icon.** Select an icon to represent the event status.
  - **State.** The state of the event status that will determine how the system processes a custom event.
    - **Error.** Choose the option if you want to denote the issues and do not want to end the process.
    - **Final.** Choose the option if you want to end the process.
4. To delete an event status, in the **Event Status** page, click the **Delete** icon next to the event status that you want to delete and confirm the deletion. You can't delete a system-defined event status or a custom event status that is assigned an event.

## Deleting a custom event status

Use the Navigator in B2B Gateway to delete a custom event status.

1. In the Navigator, click **Events > Event Status**.  
The **Event Status** page with a list of pre-defined and custom event statuses appears.
2. To delete an event status, click the **Delete** icon next to the event status that you want to delete and confirm the deletion. You cannot delete a system-defined event status.

## Connections

When you define a partner you also define a connection for each of the partner flows, an inbound connection for the inbound flow and an outbound connection for the outbound flow.

In the inbound connection, you define the source from where B2B Gateway picks up files. In the outbound connection, you define the target where B2B Gateway places the files for the partner.

Configure connections in Administrator. For more information about configuring connections, see *Connections* in the Administrator help.

# B2B Gateway processes

B2B Gateway processes messages and files that you exchange with your trading partners.

When you receive partner messages and files, B2B Gateway runs an inbound process flow. When you send messages and files to partners, B2B Gateway runs an outbound process flow.

## Processes for EDI X12 and EDIFACT messages

When you exchange EDI and EDIFACT messages with your partners, B2B Gateway runs the pre-packaged EDI processing mappings and any custom mappings that you assigned to the partner.

The pre-packaged EDI processing mappings that B2B Gateway provides support EDI message types for inbound and outbound flows, based on the type of process with the partner, EDI X12 or EDIFACT message exchange.

### EDI X12 message versions

The pre-packaged EDI processing mappings support the following EDI message versions:

- 2001
- 2002
- 2040

**Note:** B2B Gateway supports the EDI X12 2040 formatting standard for the 810, 850, and 856 message types.

- 3010
- 3020
- 3030
- 4010

**Note:** B2B Gateway supports the EDI X12 4010 formatting standard for the 212 message type.

- 4020
- 4030
- 4040
- 4050
- 4060
- 5010
- 5020
- 5030
- 5040
- 5050
- 6020
- 6040
- 6050
- 7010

**Note:** B2B Gateway supports the EDI X12 7010 formatting standard for the 431, 434, 437, and 475 message types.

## EDI X12 messages

The pre-packaged EDI processing mappings support the following message types for EDI X12 messages:

Message description	Message type
Air Freight Details and Invoice	110
Return Merchandise Authorization and Notification	180
Secondary Mortgage Market Investor Report	203
Motor Carrier Load Tender	204
Motor Carrier Freight Details and Invoice	210
Motor Carrier Bill of Lading	211
Transportation Carrier Shipment Status Message	214
Motor Carrier Pickup Manifest	215
Logistics Service Response	220
Response to a Cartage Work Assignment	225
Motor Carrier Package Status	240
Account Assignment/Inquiry and Service/Status	248
Residential Mortgage Insurance Explanation of Benefits	259
Application for Mortgage Insurance Benefits	260
Mortgage or Property Record Change Notification	266
Medicare Benefits Inquiry	270
Medicare Benefits Response	271
Salvage transaction	272
Booking Request	300
Booking Confirmation	301
Shipping Instructions	304
Customs Manifest	309

Message description	Message type
Freight Receipt and Invoice	310
Status Details (Ocean)	315
Customs Status Information	350
Customs Events Advisory Details	353
U.S. Customs Acceptance/Rejection	355
U.S. Customs In-Bond Information	357
Customs Consist Information	358
Rail Carrier Shipment Information	404
Rail Carrier Freight Details and Invoice	410
Shipment Weights Transaction Set	440
Routing Request	753
Routing Instructions	754
Invoice	810
Consolidated Service Invoice/Statement	811
Credit/Debit Adjustment	812
General Request, Response or Confirmation	814
Cryptographic Service Message	815
Organizational Relationships	816
Remittance Advice	820
Lockbox	823
Application Advice	824
Planning Schedule with Release Capability	830
Price/Sales Catalog	832
Healthcare Claim Payment/Advice	835
Procurement Notices	836
Health Care Claim	837
Trading Partner Profile	838

Message description	Message type
Product Transfer Account Adjustment	844
Price Authorization Acknowledgment/ Status	845
Inventory Inquiry/Advice	846
Response to Product Transfer Account Adjustment	849
Purchase Order	850
Product Activity Data	852
Purchase Order Acknowledgment	855
Advance Ship Notice	856
Purchase Order Change Request	860
Receiving Advice/Acceptance Certificate	861
Shipping Schedule	862
Text Message	864
Purchase Order Change Acknowledgment/ Request	865
Product Transfer and Resale Report	867
Order Status Report	870
Grocery Products Purchase Order	875
Grocery Products Purchase Order Change	876
Grocery Products Invoice	880
Item Maintenance	888
Warehouse Shipping Order	940
Warehouse Stock Transfer Shipment Advice	943
Warehouse Stock Transfer Receipt Advice	944
Warehouse Shipping Advice	945
Warehouse Inventory Adjustment Advice	947
Response to a Load Tender	990

Message description	Message type
EDI Functional Acknowledgment	997
EDI Technical Acknowledgment	TA1

#### EDIFACT messages

The pre-packaged EDI processing mappings support the following message types for EDIFACT messages:

Message Description	Message Type
Application Error and Acknowledgement	APERAK
Invoice	INVOIC
Remittance Advice	REMADV
Planning Schedule with Release Capability	DELFOR
Purchase Order	ORDERS
Purchase Order Acknowledgment	ORDRSP
Advance Ship Notice	DESADV
Purchase Order Change Request	ORDCHG
Purchase Order Change Acknowledgment/ Request	ORDRSP
EDIFACT Acknowledgment	CONTRL
Instruction to Dispatch	INSDS
Order Status Report	OSTRPT
Receiving Advice	RECADV
Balance of Payment Information from Customer	BOPINF
Price/sales Catalogue Message	PRICAT
Customs Response Message	CUSRES
Customs Conveyance Report Message	CUSREP
International Multimodal Status Report Message	IFTSTA
Inventory Report Message	INVRPT
Sales Data Report Message	SLSRPT

Message Description	Message Type
Container Announcement Message	COPARN
Container Discharge/Loading Order Message	COPRAR
Customs Cargo Report Message	CUSCAR
Firm Booking	IFTMBF
Instruction Message	IFTMIN
Forwarding and Transport Schedule	IFTSAI
Instruction Contract Status Message	IFTMCS
Dangerous Goods Notification Message	IFTDGN
Forwarding and Consolidation Summary Message	IFCSUM
Container Discharge/Loading Report Message	COARRI
Container Gate-In/Gate-Out Report Message	CODECO
Bayplan/Stowage Plan Occupied and Empty Locations Message	BAPLIE

The pre-packaged EDI X12 and EDIFACT processing mappings support both inbound and outbound flows for all the message types involved in the order-to-cash process and procure-to-pay process.

#### **EDIFACT message versions**

The pre-packaged EDIFACT processing mappings support the following EDIFACT message versions:

- D00B
- D00A
- 95B
- 96B
- 98B
- 99B
- 02B
- 01A

#### **Tax Control (TAXCON) message types**

B2B Gateway supports the following Tax Control (TAXCON) message types:

- 99B
- 06B

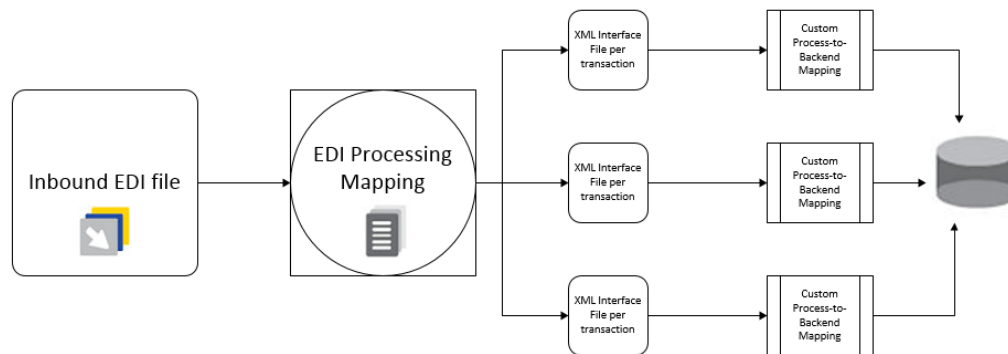
## Inbound process for EDI messages

To receive messages that a partner sends to the organization, B2B Gateway runs an inbound flow according to the defined schedule.

The inbound flow for EDI messages includes the following stages:

1. When an inbound process runs, B2B Gateway runs the B2B Gateway pre-packaged, EDI processing mapping. The source and target of the mapping are based on the source and target details from the partners definition metadata. The source of the mapping is the location from where to read the incoming messages, and the target of the mapping is an interface file on B2B Gateway.
2. The mapping converts the EDI messages to XML interface files, one file for each functional group, and places the files on B2B Gateway.
3. B2B Gateway validates the incoming messages. If any of the validations fail, B2B Gateway rejects the message and creates an error event.
4. If during partner configuration you selected to send technical or functional acknowledgments to the partner, B2B Gateway sends an EDI functional and technical acknowledgment to the partner.
5. If during partner configuration you assigned a process-to-backend custom mapping for the inbound flow, B2B Gateway runs the mapping. If you assigned values to mapping parameters during partner configuration, B2B Gateway uses the values in the mapping flow.  
If you did not assign a mapping, the inbound process ends with the placement of the interface files on B2B Gateway. You can use your own method to process the interface files to your backend systems.

The following image shows the processing flow for an inbound EDI file:



## Outbound process for EDI messages

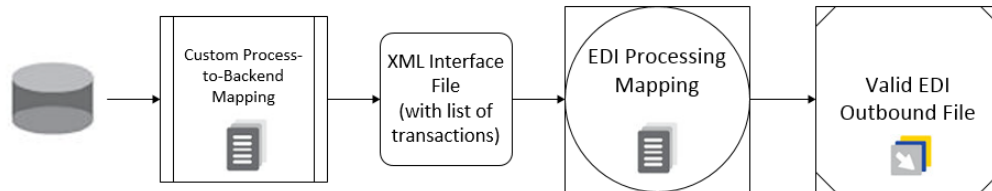
To send messages to partners, B2B Gateway runs an outbound process flow according to the defined schedule.

The outbound flow for EDI messages includes the following stages:

1. When an outbound process starts, B2B Gateway first runs the custom process from the backend mapping that you defined in the partner definition. The output of the mapping should be interface files that include the messages to send to your partners. The mapping places the files on B2B Gateway.
2. B2B Gateway uses the pre-packaged, EDI processing mapping to read the interface files, and then enriches the data in the interface file with the partner metadata and creates valid EDI messages. If you assigned values to mapping parameters during partner configuration, B2B Gateway uses the values in the mapping flow. The mapping source and target details are based on the partner definition metadata. The source of the mapping is the interface files, and the target of the mapping is the location where to send the messages.



The following image shows the processing flow for an outbound EDI file:



## Processes for custom files with custom mappings

When you exchange custom, non-EDI files with your partners, you create custom mappings that process the files, and then assign the mappings to the partner.

B2B Gateway runs the mappings that you assign to the partner according to the defined schedule.

### Inbound process for custom files

To receive and process custom, non-EDI files that a partner sends to the organization, B2B Gateway runs the inbound flow that is defined for the partner according to the defined schedule.

You can use one of the following methods to process inbound custom files:

- Two-step processing, using two custom mappings. An inbound mapping reads the file that the partner sends, processes it, and writes the file to an interface file on the B2B Gateway document store. A process-to-backend mapping then writes the data to the backend system. When you use two-step processing, you can use a single process-to-backend mapping to process all inbound custom files to your backend system from a single interface file.
- Single-step processing. A single custom mapping reads the file that the partner sends, processes it, and writes the file directly to the backend system. When you use single-step processing, you must write the logic of writing the data to the backend system for every inbound custom file from each partner.
- Intelligent Structure Discovery processing. Use Intelligent Structure Discovery to discover the file structure of a custom input file, and auto-generate a parsing process that creates an interface CSV file with the discovered content. The Intelligent Structure Discovery parsing process replaces a custom inbound mapping. You can also create a custom process-to-backend mapping to process the auto-generated interface file to the backend system.

The inbound flow for custom files includes the following stages:

1. When an inbound process runs, B2B Gateway runs the inbound mapping that you assigned the partner. The source and target of the mapping are based on the source and target details from the partners definition metadata. The source of the mapping is the location from where to read the incoming files. The target of the mapping can be either an interface file on B2B Gateway or the backend system.
2. If the target of the inbound mapping is an interface file on B2B Gateway, and if during partner configuration you assigned a process-to-backend mapping for the inbound flow, B2B Gateway runs the defined mapping. If you assigned values to mapping parameters during partner configuration, B2B Gateway uses the values in the mapping flow. The mapping writes the data to the backend system. If you did not assign a process-to-backend mapping, the inbound process ends with the placement of the interface file on B2B Gateway. You can use your own method to write the data to the backend system.
3. If the target of the inbound mapping is the backend system, B2B Gateway writes the data to the backend system.

## Outbound process for custom files

To send custom, non-EDI files to a partner, B2B Gateway runs the outbound flow according to the defined schedule.

The outbound flow for custom files includes the following stages:

1. When an outbound process starts, B2B Gateway first runs the custom process from the process-from-backend mapping that you defined in the partner definition and reads the data from the backend system. If you assigned values to mapping parameters during partner configuration, B2B Gateway uses the values in the mapping flow.
2. The mapping writes the data to an interface file on B2B Gateway.
3. If during partner configuration you assign an outbound mapping for the flow, B2B Gateway runs the mapping and sends the files to your partner. If you assigned values to mapping parameters during partner configuration, B2B Gateway uses the values in the mapping flow. If you did not assign an outbound mapping, the outbound process ends with the placement of the interface files on B2B Gateway. You can use your own method to send the files to your partner.

## Process for inbound custom files with Intelligent Structure Discovery

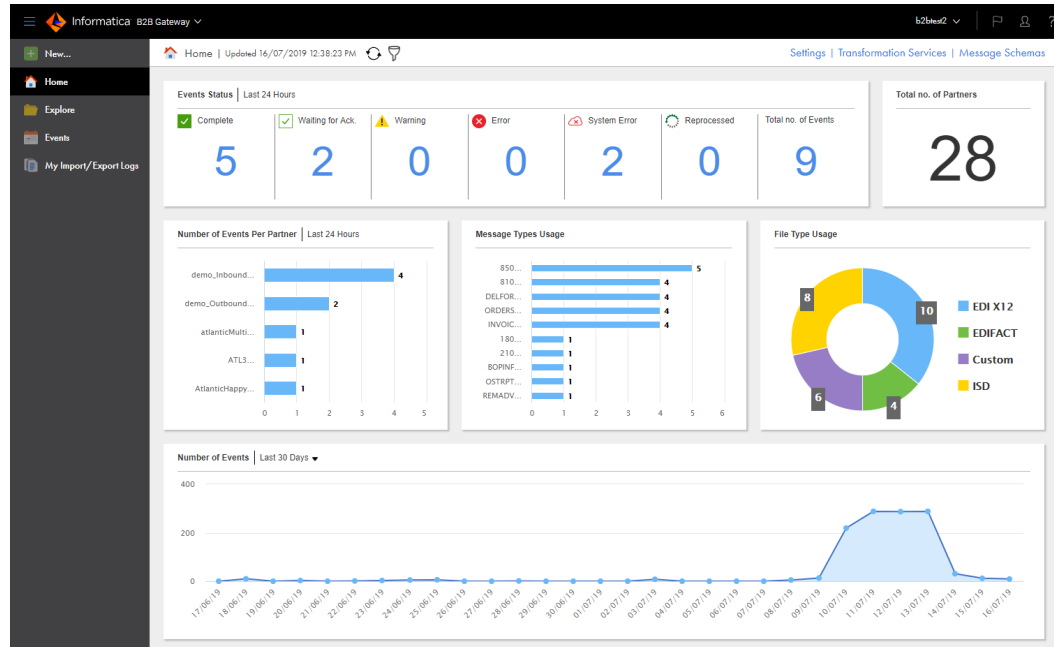
For inbound Excel, TXT, and CSV files you can use Intelligent Structure Discovery to automatically discover the structure of the files and generate the interface files. You can create a custom process-to-backend mappings to process the interface files to the backend system.

B2B Gateway runs the structure and the custom mapping that you assign to the partner according to the defined schedule.

# Home page

The B2B Gateway **Home** page gives you an overview of your organization's partners, events, and files.

After your organization is set up in B2B Gateway and you have at least one partner in your organization, when you open B2B Gateway, the **Home** page appears. The following image shows an example of the **Home** page:



The **Home** page displays the following information:

- **Events Status.** The number of events that are in each status. The default range is the last 24 hours. To view the events with a specific status, click the number of events.
- **Total no. of Partners.** The number of customers and suppliers in the organization.
- **Number of Events Per Partner.** The number of partner events for the 10 partners with the most events. The default range is the last 24 hours. To view the events for a specific partner, click the bar on the graph.
- **Message Types Usage.** The 10 most used X12 and EDIFACT message types in the organization.
- **File Type Usage.** The total number of each file type exchanged with partners.
- **Number of Events.** The number of events per day. The default range is the last 30 days. To view the events for a specific day, click the point on the graph.

The Events Status and Number of Events Per Partner graphs show information for the last 24 hours by default. You can apply filters to see event information for a specified date range. To apply a filter, click the filter icon at the top of the **Home** page. To specify a date range, click **Add Field** and select **Date Range**. You can apply the following filters:

- Last 24 hours
- Last 7 days
- Custom Range. You can set a maximum range of seven days.

You can refresh the **Home** page in the following ways:

- Navigate back to the **Home** page from any other page.

- Click the **Refresh** icon in the upper left of the dashboard.

You can access the following pages from the upper right **Home** page:

- Settings. View and update organization settings.
- Transformation Services. Create and manage transformation services.
- Message Schemas. Create and manage message schemas.

You can access the following pages from the navigation bar:

- New. Create a new B2B Gateway asset.
- Home. Return to the **Home** page.
- Explore. Manage Informatica Intelligent Cloud Services assets within your organization.
- Events. View the status of B2B Gateway events.
- My Import/Export Logs. View the status of your imports and exports.

## Explore page

Use the **Explore** page to work with your Informatica Intelligent Cloud Services projects and assets.

### Finding projects and assets on the Explore page

Use any of the following methods to find your projects and assets on the **Explore** page:

- Explore by projects and folders. View all projects or select a particular project.
- Explore by asset types. View all assets or view assets of a particular type.
- Explore by tags. View assets associated with a particular tag.
- Search for projects or assets. To search all projects, folders, and assets in the organization, view the **Explore** page by **All Projects**, and then enter a name or description in the Find box. Or, to narrow your search, filter the **Explore** page by **All Assets**, select a specific asset type, project, or folder, and then enter a name or description in the Find box.
- Sort the search results. Sort the **Explore** page by name, last update date, description, or type. When you sort by type, the **Explore** page groups assets by asset type. It does not list the asset types in alphabetical order.

You can see projects, folders, and assets for all of the services that you use. If you select an asset to open it or perform an action and the asset is created in a different service than the one you have open, the service opens in a new browser tab.

You can't use the following characters:

# ? ' | { } " ^ & [ ] / \

Do not use these characters in project, folder, asset, or tag names.

## Working with projects and assets on the Explore page

Perform actions on projects, folders, and assets on the **Explore** page. To see what actions you can perform on an object, in the row that contains the object, click the **Actions** icon, as shown in the following image:

The screenshot shows the 'Explore' page with a table of assets. The '1000-events' asset is selected, and the Actions menu is open, displaying various actions available to the user.

Name	Type	Updated On	Location	Description	Tags	Status
1000-events	Customer	Aug 28, 2019, 12:07 PM	Default			Valid
92 interchange OB test fix	Customer	Aug 25, 2019, 4:16 PM	Default			
atlantic_UNIX	Intelligent S...	Aug 25, 2019, 12:08 PM	Default	USED BY B2B-GW - PLS DO NOT DELETE!!!		
atlantic-19-08-25-NRO	Customer	Aug 26, 2019, 4:49 PM	Default			
atlantic-19-08-26-E6S	Customer	Aug 26, 2019, 2:07 PM	Default			
atlantic-19-08-26-O64	Customer	Aug 27, 2019, 10:07 AM	Default			
atlantic-19-08-26-Z2R	Customer	Aug 26, 2019, 2:03 PM	Default			
atlantic-19-08-26-ZNS	Customer	Aug 26, 2019, 4:22 PM	Default			
atlantic-19-08-27-SNP	Customer	Aug 27, 2019, 3:41 PM	Default			Valid
atlantic-19-08-27-BHX	Customer	Aug 27, 2019, 3:13 PM	Default			Valid
atlantic-19-08-27-CFH	Customer	Aug 27, 2019, 11:31 AM	Default			Valid
atlantic-19-08-27-FX4	Customer	Aug 27, 2019, 10:23 AM	Default			Valid
atlantic-19-08-27-GK8	Customer	Aug 27, 2019, 4:09 PM	Default			Valid
atlantic-19-08-27-IR1	Customer	Aug 27, 2019, 10:39 AM	Default			Valid

1 - 25 of 254

Items per Page: 25

Actions menu for '1000-events':











- Properties...
- View
- Edit
- Run Inbound Flow
- Run Outbound Flow
- Copy To...
- Move To...
- Export...
- Show Dependencies
- Permissions...
- Delete

The Actions menu lists the actions you can perform based on your user role privileges and the permissions specified for the selected object. For example, your user role might have privileges to run partner flows but not to delete partners. You might not have permission to run a particular partner flow because of the permissions set by the creator of the partner.

You can also perform an action on multiple objects at one time. Select the check box to the left of each object, or select the Select All check box to select all of the objects that are displayed on the current page. The following image shows the Select All check box in use:

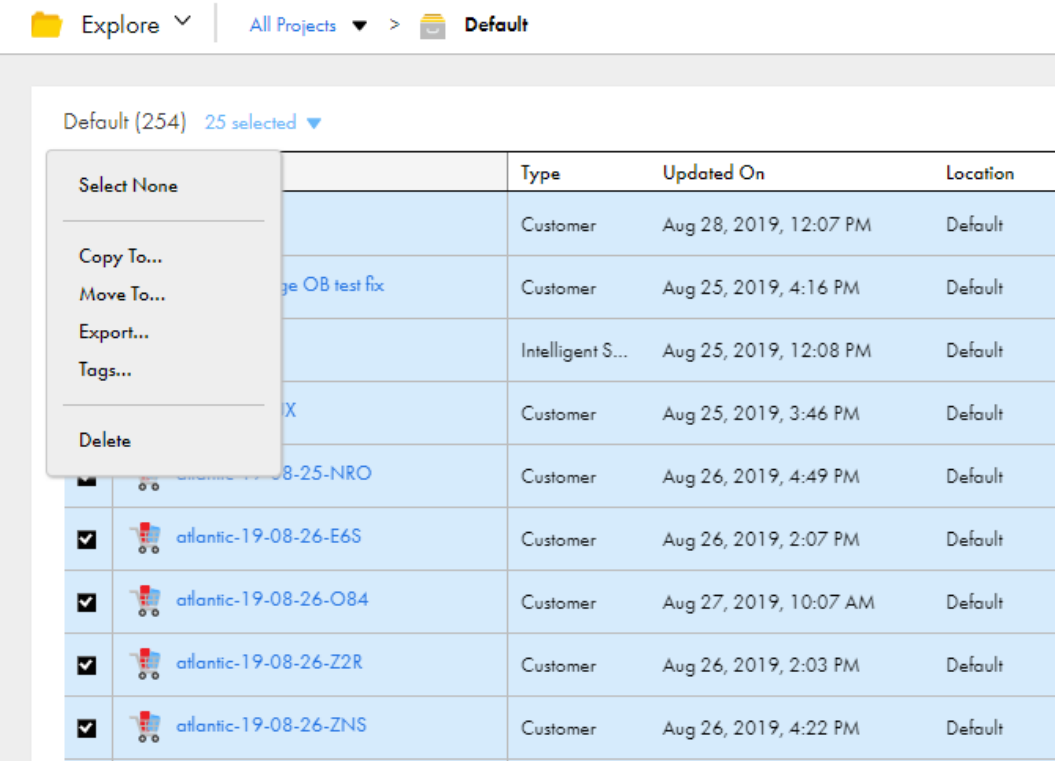
Explore ▾ | All Projects ▾ > Default

Default (254) 25 selected ▾

<input checked="" type="checkbox"/>	Name	Type	Updated On	Location
<input checked="" type="checkbox"/>	 1000-events	Customer	Aug 28, 2019, 12:07 PM	Default
<input checked="" type="checkbox"/>	 92 interchange OB test fix	Customer	Aug 25, 2019, 4:16 PM	Default
<input checked="" type="checkbox"/>	 atl	Intelligent S...	Aug 25, 2019, 12:08 PM	Default
<input checked="" type="checkbox"/>	 atlantic_LINUX	Customer	Aug 25, 2019, 3:46 PM	Default
<input checked="" type="checkbox"/>	 atlantic-19-08-25-NRO	Customer	Aug 26, 2019, 4:49 PM	Default
<input checked="" type="checkbox"/>	 atlantic-19-08-26-E6S	Customer	Aug 26, 2019, 2:07 PM	Default
<input checked="" type="checkbox"/>	 atlantic-19-08-26-O84	Customer	Aug 27, 2019, 10:07 AM	Default
<input checked="" type="checkbox"/>	 atlantic-19-08-26-Z2R	Customer	Aug 26, 2019, 2:03 PM	Default
<input checked="" type="checkbox"/>	 atlantic-19-08-26-ZNS	Customer	Aug 26, 2019, 4:22 PM	Default
<input checked="" type="checkbox"/>	 atlantic-19-08-27-5NP	Customer	Aug 27, 2019, 3:41 PM	Default

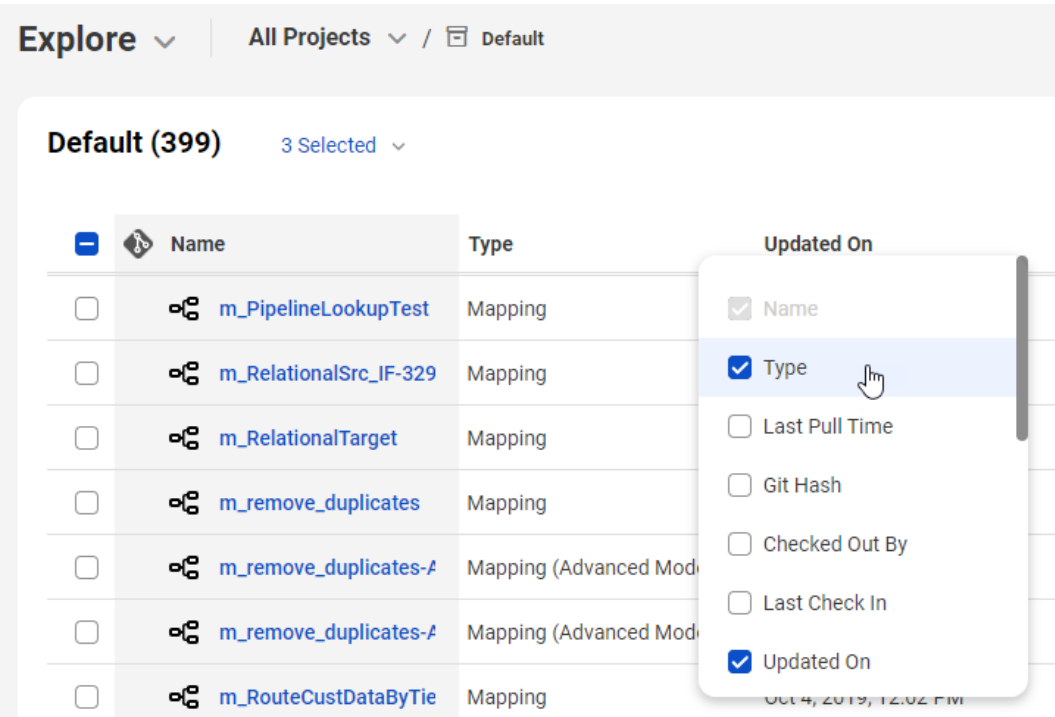
After you select the objects, click **Actions** in the row of any of the selected objects. The Actions menu will list the actions available for the selected assets based on your user role and privileges.

Alternatively, you can use the Selection menu to choose the action, as shown in the following image:



### Customizing the Explore page

You can display, hide, or rearrange object properties on the **Explore** page. To display or hide properties, right-click the column heading area and check or uncheck the properties. The following image shows the properties menu on the **Explore** page column heading area:



To rearrange columns, click a column heading and drag it to a different location.

## Security

Informatica Intelligent Cloud Services uses authentication and encryption to ensure that data is secure and available only to users within the organization. Informatica Intelligent Cloud Services uses industry approved algorithms to encrypt sensitive information.

All sensitive customer data is encrypted at rest using an AES-256 key. All customer data in transit is encrypted using either the TLS 1.2 or TLS 1.3 protocol depending on which ciphers are used in the customer's environment. TLS 1.3 offers several improvements over TLS 1.2 including improved performance and simpler, more secure cipher suites.

For more information about security in Informatica Intelligent Cloud Services, see the [Informatica Intelligent Cloud Services Trust Center](#). For more information about supported ciphers, see the [Change in Cipher Suites for IDMC](#) Knowledge article.

## REST API

If your organization has the REST API license, you can interact with Informatica Intelligent Cloud Services through REST API calls rather than through the user interface.

For more information, see *REST API Reference*.

## File Patterns

The following table lists the patterns that are supported when you provide file names in **Outbound** and **Outbound Acknowledgement** tab:

Pattern	Description
msgType	Message type of the EDI X12 or EDIFACT message.
groupCtrlNo	The control number for the functional group .
interchangeCtrlNo	The interchange control number of the message.
YYYY	Pattern for year in four-digit format. If you provide the input file pattern as (\$YYYY), the file name on the <b>Events</b> page will include YYYY format. For example, 2023.
YY	Pattern for year in two-digit format. If you provide the input file pattern as (\$YY), the file name on the <b>Events</b> page will include YY format. For example, the file name will include 23 for the year 2023.



Pattern	Description
MM	Pattern for month in two-digit format. If you provide the input file pattern as (\$MM), the file name on the <b>Events</b> page will include MM format. For example, the file name will include 04 for the April month.
DD	Pattern for day in two-digit format. If you provide the input file pattern as (\$DD), the file name on the <b>Events</b> page will include DD format. For example, the file name will include 12 for the 12th day of a month.
HH24	Pattern for hour in day (1-24 hours) . If you provide the input file pattern as (\$HH24), the file name on the <b>Events</b> page will include HH24 format. For example, the file name will include 18 for 6 PM.
HH12	Pattern for hour in day (1-12 hours). If you provide the input file pattern as \$HH12, the file name on the <b>Events</b> page will include HH12 format. For example, the file name will include 06 for 6 PM.
MN	Pattern for minutes. If you provide the input file pattern as \$MN, the file name on the <b>Events</b> page will include MN format. For example, the file name will include 32 for 3:32 PM.
SS	Pattern for seconds. If you provide the input file pattern as \$SS, the file name on the <b>Events</b> page will include SS format. For example, the file name will include 06 for 3:32:06 PM.
sss	Pattern for milliseconds. If you provide the input file pattern as \$sss, the file name on the <b>Events</b> page will include sss format. For example, the file name will include 543 for 3:32:543 PM.
Z	Pattern for timezone. If you provide the input file pattern as \$Z, the file name on the <b>Events</b> page will include Z format. The file name will include values such as IDT, IST, PST, and so on.
eventId	Unique identifier for the event associated with processing the EDI group.
partnerName	The name of the partner.
senderInterchangeId	The identification code published by the sender for other parties to use as the receiver ID to route data. You can use this parameter in the file patterns that are provided for the EDI X12 messaging.

## CHAPTER 2

# B2B Gateway administration

After you set up the organization in Informatica Intelligent Cloud Services, you can manage your organization, including settings and users, file servers, transformation services, message schemas, and access to B2B Partners Portal.

You can perform following tasks:

- Set up your organization in B2B Gateway and edit organization settings.
- If user roles are defined for the organization in Informatica Intelligent Cloud Services, verify that users have permissions to perform the required actions in Informatica Intelligent Cloud Services.
- Configure file servers and file server users to enable file exchange with your partners using advanced file servers and file transfer protocols.
- Manage transformation services for customized EDI messages and for outbound EDI UCS and VICS messages.
- Upload message schemas to Informatica Intelligent Cloud Services.
- Enable access to B2B Partners Portal for trading partners and customize the portal appearance.

## Organization management

Before the organization can use B2B Gateway, you must set up an organization in Informatica Intelligent Cloud Services and then set up the organization in B2B Gateway.

For information about setting up your organization in Informatica Intelligent Cloud Services, see the Administrator help.

### Before You Begin

Before you set up the organization in B2B Gateway, open Administrator and verify that the following conditions exist.

#### Configuration

On the **Runtime Environments** page in Administrator, verify that the Secure Agent is running. The Secure Agent must be running to run partner flows.

## Administration

On the **Licenses** page in Administrator, verify that the following licences are valid:

License	Category
Mappings	Application
DT XML Processing	Feature
REST API	Verify that <b>Maximum Concurrent Sessions</b> is set to a high value, for example, 100 sessions.
B2B EDI Gateway	Connector
B2B EDI Gateway Endpoint	Connector
B2BProcessor	Package
EDI Gateway	Bundle
DataTransformation	Package
B2BEDIGateway	Package
UDTforHierarchy	Package
B2B Partners Portal	Service

## Proxy Settings

If your organization uses an outgoing proxy server to connect to the internet, set the following JVM options on the Secure Agent:

Name	Value
JVMOption1	-Dhttp.proxyHost=<proxy host>
JVMOption2	-Dhttp.proxyPort=<proxy port>
JVMOption3	-Dhttp.useProxy=true
JVMOption4	-Dhttp.proxyUser=<proxy user name>
JVMOption5	-Dhttp.proxyPassword=<proxy password>

After the Secure Agent restarts, check the agent core log file to verify that the correct proxy server is used. The agent core log file is the following file:

```
<Secure Agent installation directory>\apps\agentcore\agentcore.log
```

To find the proxy information, search for "proxy" in the log file.

## Setting up the organization in B2B Gateway

Set up the organization in B2B Gateway.

1. Access B2B Gateway from the **My Services** page.  
The **Organization Setup** dialog box appears.
2. Define the following settings and then click **Save**:

Property	Description
Organization Name	Name of the organization in Informatica Intelligent Cloud Services. Appears in view only mode.
Organization ID	ID of the organization in Informatica Intelligent Cloud Services. Appears in view only mode.
X12 Interchange Qualifier	Required if you exchange X12 messages with your partners. Interchange qualifier of the organization to use in outbound X12 messages. If you want B2B Gateway to use a different qualifier in outbound messages for specific partners, you can provide the qualifier to use for the partner when you create or edit the partner.
X12 Interchange ID	Required if you exchange X12 messages with your partners. Interchange identifier of the organization to use in outbound X12 messages. If you want B2B Gateway to use a different identifier in outbound messages for specific partners, you can provide the identifiers to use for the partner when you create or edit the partner.
EDIFACT Interchange Qualifier	Required if you exchange EDIFACT messages with your partners. Interchange qualifier of the organization to use in outbound EDIFACT messages. If you want B2B Gateway to use a different qualifier in outbound messages for specific partners, you can provide the qualifier to use for the partner when you create or edit the partner.
EDIFACT Interchange ID	Required if you exchange EDIFACT messages with your partners. Interchange identifier of the organization to use in outbound EDIFACT messages. If you want B2B Gateway to use a different identifier in outbound messages for specific partners, you can provide the identifiers to use for the partner when you create or edit the partner.
Rotate Key	Click <b>Rotate Key</b> to rotate the encryption key used for data encryption.

The following additional properties are required for runtime processing of messages and files:

Property	Description
Enable Runtime Processing	Select to run inbound and outbound partner flows. <b>Note:</b> If runtime processing is not enabled, you cannot run partner flows.
Informatica Cloud User	Name of the Informatica Intelligent Cloud Services user to use at run time. The user must have all the permissions that are required for B2B Gateway administrators, B2B Gateway users, and Data Integration users. For more information about the required permissions, see <a href="#">"User roles" on page 37</a> .
Informatica Cloud Password	Password for the Informatica Intelligent Cloud Services user to use at run time.
Runtime Environment	Informatica Intelligent Cloud Services Secure Agent runtime environment to use at run time.

Property	Description
Document Store	File directory inside the organization where B2B Gateway stores all the documents that the organization exchanges with partners, for tracking purposes. The directory must be accessible to the runtime environment. Do not create the document store directory in the Secure Agent installation home directory or any subdirectory. You must enter an absolute path to the directory.
Minimize number of processing tasks	B2B Gateway can group process-to-backend mappings for an inbound flow, and create a single mapping to handle all the XML interface files created during EDI X12, EDIFACT, or custom file processing. Recommended only when system resources are limited.

**Warning:** When you set up the organization in B2B Gateway, B2B Gateway creates the connections **B2B EDI Gateway**, **B2B EDI Gateway Endpoint**, and **B2B Gateway Document Store** in the Informatica Intelligent Cloud Services organization. Do not rename or edit these connections. Editing a connection or changing a connection name might result in errors at run time.

## Editing Organization Settings in B2B Gateway

Edit the organization settings in B2B Gateway.

1. Log in to B2B Gateway with your Informatica Intelligent Cloud Services credentials.
2. Click **Settings** in the upper right corner of the screen.  
The **Organization Setup** dialog box shows.
3. Edit the required settings and then click **Save**.

## User roles

A role is a collection of privileges that you can assign to users and user groups.

A role defines the privileges for different types of assets and service features. For example, users with the Designer role can create, read, update, delete, and set permissions on B2B Gateway assets. However, they do not have access to certain Administrator features such as licenses.

To configure user roles, you need the Administrator role.

You can assign the following types of roles:

### System-defined

System-defined roles are pre-defined roles that define access privileges for the services that your organization uses. You cannot edit or delete system-defined roles.

### Custom role

Custom roles are roles that you create to set privileges individually. To create custom roles, you need the appropriate license. You can edit and delete custom roles.

Some system-defined roles have access privileges across multiple services. For example, users with the Designer role can create a mapping in Data Integration, add the mapping to a B2B Gateway partner as a process-from-backend mapping, and run the partner flow.

The following cross-service roles apply to B2B Gateway:

- Administrator
- Designer
- Monitor

For more information about user roles, see the Administrator help.

## File servers and file transfer protocols

You can exchange files with your partners using advanced file servers and file transfer protocols.

Configure file transfer servers and file transfer users to allow remote partners to send files from AS2, HTTPS, and SFTP servers to your Informatica Intelligent Cloud Services organization, and to receive files that you send to HTTPS and SFTP servers.

Configure the file server properties on the **File Servers** page in Administrator. Configuration includes properties such as file server details, encryption methods, and allowed file types. For more information about configuring file servers, see *File transfer* in the Administrator help.

To exchange files with a partner using advanced file servers, you select the file servers connection when you configure the partner flow. For more information, see [Chapter 8, "Partners" on page 98](#).

You can enable your trading partners to send and receive files over HTTPS through B2B Partners Portal. For more information, see the B2B Partners Portal help.

You can monitor file transfer jobs on the **File Transfer Logs** page in Monitor. For information, see the Monitor help.

Alternatively, you can use the following advanced FTP connectors to exchange files with your partners:

- Advanced FTP V2 Connector
- Advanced FTPS V2 Connector
- Advanced SFTP V2 Connector

For more information about the advanced FTP connectors, see the respective connector guides.

## File server users

Create a user account for each partner that sends files from an AS2, HTTPS, or SFTP server to your organization or receives files that you send to an HTTPS or SFTP server for the partner. The user account enables the partner to upload files to your file servers and to download files that you upload to your file servers for the partner.

You don't need to configure file server users when you use the advanced FTP connectors.

For each partner, configure the following types of properties:

- General properties such as user name, email address, and password.
- Server-specific properties such as the remote server ID, certificate information, and the upload or download folder.

**Note:** File server user accounts are different from Informatica Intelligent Cloud Services user accounts. File server user accounts enable partner users to send files to your organization's file servers. Informatica

Intelligent Cloud Services user accounts enable your users to access your Informatica Intelligent Cloud Services organization.

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

## Custom B2B Gateway transformation services

B2B Gateway uses transformation services to convert inbound EDI messages to interface files and convert interface files to outbound EDI messages. B2B Gateway mappings include out-of-the-box transformation services that convert a specific message type in its standard format. You can create custom transformation services to process customized EDI messages and to enable EDI UCS and VICS messages in outbound flows.

### Customized EDI messages

Your organization or your partners might choose to customize EDI messages by adding or removing message elements. To process the customized messages, you create custom transformation services that are based on out-of-the-box transformation services of the same message type.

For example, consider an online furniture vendor that uses EDI 850 Purchase Order messages. The EDI 850 message structure defines hundreds of data elements. The vendor uses most of the standard elements, but customizes their messages by removing and adding the following elements:

- Removing the batch number and expiration elements
- Adding a custom element for the wood type

To process the customized EDI 850 messages from this vendor, create a custom B2B Gateway transformation service that is based on the standard EDI 850 transformation service, remove the unused elements from it, and add a wood type element to it.

### Outbound UCS and VICS messages

EDI UCS and VICS are subsets of the EDI standard. To send UCS and VICS messages to partners, create a custom B2B Gateway transformation service for each message type, version, and EDI subset that you want to use in outbound partner flows. You don't need to create custom B2B Gateway transformation services for inbound UCS and VICS messages.

For example, to send 810 VICS messages, create a custom B2B Gateway transformation service for 810 VICS. To send 880 UCS messages, create a custom B2B Gateway transformation service for 810 UCS.

B2B Gateway manages the customized services in the B2B Gateway repository. You select the customized service when you create a partner, for the appropriate message type.

To work with transformation services, you must have administrative privileges.

## Custom B2B Gateway transformation service process

You use custom B2B Gateway transformation services to process customized EDI messages and to process outbound EDI UCS and VICS messages.

To create a custom B2B Gateway transformation service, perform the following tasks:

1. In B2B Gateway, search for and download an out-of-the-box transformation service for the standard form of the same EDI message.

2. Depending on the type of custom B2B Gateway transformation service you create, perform one of the following tasks:
  - To create a custom B2B Gateway transformation service for customized EDI messages, edit the relevant out-of-the-box transformation service to align with the customized message structure. You can edit the service with Data Transformation, using the Library Customization Tool. For more information, see the *Data Transformation User Guide*.
  - To create a custom B2B Gateway transformation service for outbound EDI UCS or VICS messages, edit the serializer of the relevant out-of-the-box transformation service to indicate the relevant message subset type, UCS or VICS. You can use any editor that opens TGP files to edit the serializer.
3. Create a custom B2B Gateway transformation service and associate the custom transformation service with it.

When you define a partner in B2B Gateway, you can associate a custom transformation service with a specific EDI message that is sent from or to the partner. B2B Gateway runs the service when a flow runs for the partner for the message that is associated with the service.

## Searching for a B2B Gateway transformation service

Custom transformation services and out-of-the-box transformation services are displayed in different views on the **Transformation Service Management** page. Search for a transformation service in the appropriate view. The default view shows custom transformation services.

1. On the upper right of the **Home** page, click **Transformation Service Management**. To switch to the out-of-the-box view, select **Out-of-the-Box**.
2. In the search field, type any part of the service name or description.

The services that match your search are displayed on the **Transformation Service Management** page.

## Downloading a B2B Gateway transformation service

You can download both custom and out-of-the-box transformation services to your local machine. After you download an out-of-the-box transformation service, you can use the service as a template to base a custom transformation service on.

1. On the upper right of the **Home** page, click **Transformation Service Management**. To switch to the out-of-the-box view, select **Out-of-the-Box**.
2. Select the row that contains the service, click the **Download** icon, and then save the ZIP file to your local machine.
3. Unzip the file to a folder with a unique name. Names are case sensitive.

## Editing a transformation service serializer for EDI VICS and UCS outbound messages

To create a customized B2B Gateway transformation service for an EDI VICS or UCS outbound message type, edit the initialization value of the out-of-the-box transformation service serializer to include the relevant



message subset type, UCS or VICS. Perform this task for each message type, version, and EDI subset type that you want to use in outbound partner flows.

1. In an editor, open the following file from the folder where you downloaded the out-of-the-box transformation service:

```
\scrips\X12_<message type>_<version>_serializer_variables.tgp
```

For example, to edit the serializer of message type 4010, version 204, open the following file:

```
\scrips\X12_4010_204_serializer_variables.tgp
```

2. Expand the `functionalGroupVersionsSupported` function, and add the message subset type to the value of `initialization`. For example, to use message type 4010 VICS in outbound flows, change the value of `initialization` to `004010VICS`.
3. Save the file.

## Creating a custom B2B Gateway transformation service

When you create a custom B2B Gateway transformation service, you upload a transformation service that you created or edited externally.

By default, B2B Gateway uploads the message schema that is associated with the transformation service to Informatica Intelligent Cloud Services as a hierarchical schema. You can use the hierarchical schema with the Hierarchy Parser or Hierarchy Builder transformations in Data Integration mappings. You can select not to upload the schema when you create the service.

1. On the upper right of the **Home** page, click **Transformation Service Management** and then click **New Service**.  
The **New Service** dialog box opens.
2. Browse to find the folder that contains the transformation service that you created or edited externally.  
If you use a Chrome browser, select the folder. If you use Internet Explorer, select all the files in the folder.
3. B2B Gateway transformation service names must be unique. If a B2B Gateway transformation service by the name of the transformation service that you selected exists, rename the service. The name is case sensitive.
4. Optionally, add a description to the service. The description must not contain angled brackets (< or >).
5. To prevent B2B Gateway from uploading the message schema to B2B Gateway, deselect **Upload Schema**.
6. If **Upload Schema** is selected, in **Schema Root**, select the root element of the schema.  
You can select a root element that is used by the out-of-the-box transformation services or select a custom root element.
7. Click **Save**.

The transformation service appears on the **Custom** view of **Transformation Service Management** page.

## Editing a custom B2B Gateway transformation service

When you edit a custom B2B Gateway transformation service, you can associate a different transformation service with the service, select whether or not the upload the message schema to Informatica Intelligent Cloud Services, and select the root element of the schema.

1. On the upper right of the **Home** page, click **Transformation Service Management**.
2. Select the row that contains the service and then click the **Edit** icon.

3. To associate a different transformation service with the custom transformation service, browse to find the directory that contains the transformation service.  
If you use a Chrome browser, select the folder. If you use Internet Explorer, select all the files in the folder.
4. To select whether or not to upload the message schema to Informatica Intelligent Cloud Services, select or deselect **Upload Schema**, as appropriate.
5. If you selected **Upload Schema**, in **Schema Root**, select the root element of the schema.
6. Click **Save**.

## Deleting a custom B2B Gateway transformation service

You can delete a custom B2B Gateway transformation service that isn't assigned to a partner. You can't delete custom transformation services that are assigned to partners and out-of-the-box transformation services.

1. On the upper right of the **Home** page, click **Transformation Service Management**.
2. Select the row that contains the service and then click the **Delete** icon.
3. If the transformation schema is used by a mapping in Data Integration, a warning message is displayed. Click **OK**.

## Message Schema Upload

Process-to-backend and process-from-backend mappings that process EDI X12 and EDIFACT messages use Hierarchy Parser and Hierarchy Builder transformations, respectively.

Before you develop mappings that use the Hierarchy Parser or Hierarchy Builder transformations, you must upload the respective message schemas to Informatica Intelligent Cloud Services.

After you upload the schemas to Informatica Intelligent Cloud Services, they are available for selection during mapping development.

## Uploading Message Schemas to Informatica Intelligent Cloud Services

If user groups are defined for the organization in Informatica Intelligent Cloud Services, to perform this task you must have permissions to read, create, and update hierarchical schemas.

1. Click the **Message Schema** link in the upper right corner of the screen.  
The **Message Schema Upload** page appears.
2. Select the file type, EDI X12 or EDIFACT, and then select one or more message types and one or more message versions.  
**Note:** You can upload message schemas for one file type at a time. To upload both EDI X12 and EDIFACT schemas you must first complete the upload for one file type and then repeat the upload procedure for the second file type.
3. For EDI X12 messages, select whether to use element reference numbers or use element names in XML interface files.

4. Click **Apply**.

The messages you selected appear in the **Message Schema Upload** page.

5. Click **Upload Message Schemas**.

B2B Gateway uploads the selected schemas to Informatica Intelligent Cloud Services. The schemas are available for selection in Data Integration when you develop mappings that use the Hierarchy Parser or Hierarchy Builder transformations.

**Note:** B2B Gateway does not save a list of uploaded schemas. You can view the list of uploaded schemas in the Explore page of Data Integration.

## B2B Partners Portal setup and customization

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.

You can customize B2B Partners Portal so that your organization name and logo appear on the portal. You customize the portal appearance in B2B Partners Portal.

### Step 1. Set up partner users and roles in Administrator

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:

1. Create a custom role for partner users. Assign the role only the Partners Portal feature privilege in the B2B Partners Portal service.
2. Create an Informatica Intelligent Cloud Services user for each user in the partner company, and assign each user the partner users custom role.

For more information, see the Administrator help.

### Step 2. Set up B2B Partners Portal partners

Set up partners and partner users that can access and use B2B Partners Portal.

To set up portal partners, log in to the portal with a user that has the Admin user role. Perform the following tasks for each partner:

1. Add the partner to the portal
2. Assign portal users to the partner.

For more information, see the B2B Partners Portal help.

## Step 3. Customize B2B Partners Portal

Customize B2B Partners Portal so that your organization name, logo, or both appear on the portal.

To customize the portal, log in to the portal with a user that has the Admin user role. You can perform the following tasks:

- Customize the portal name.
- Customize the portal logo.

For more information, see the B2B Partners Portal help.

## CHAPTER 3

# Project and asset management

You can manage projects and assets on the **Explore** page. The **Explore** page is an Informatica Intelligent Cloud Services feature that is available for most services. If you use multiple services, you might see projects, folders, and assets for all of your services on the **Explore** page.

You can manage your Informatica Intelligent Cloud Services projects and assets in the following ways:

- Create assets.
- Copy projects, folders, or assets to create new versions of them.
- Move folders or assets to other locations.
- Rename projects, folders, or assets.
- Delete projects, folders, or assets.
- Apply tags so you can filter for related assets on the **Explore** page.
- Configure permissions for projects, folders, or assets.
- Use source control to manage versions of projects, folders, and assets.
- Migrate assets between organizations.

## Copying projects, folders, and assets

You can copy projects, folders, and assets on the **Explore** page. You might want to copy an object to use as a template, or you might want to create a backup copy.

When you copy objects, Informatica Intelligent Cloud Services retains child elements in the following instances:

- When you copy a project, the new project contains all of the folders and assets that were in the original project. Similarly, when you copy a folder, the new folder contains all of the assets that were in the original folder.
- When you copy assets or a folder containing assets to another location, the assets retain their references to dependent objects.  
For example, a folder in the Customers project contains the m\_cust and the mt\_ca\_cust assets. The mt\_ca\_cust asset requires the m\_cust asset. If you copy the mt\_ca\_cust asset to a folder in the Customers\_ca\_upsell project, the mt\_ca\_cust asset in the Customers\_ca\_upsell project still references the m\_cust asset in the Customers project.

When you copy an asset within a folder, you can keep both assets. When you copy an asset into a different folder that contains an asset with the same name, you can overwrite the asset in the folder or keep both. If you choose to overwrite the asset, you can merge the asset tags. If you choose to keep both assets,

Informatica Intelligent Cloud Services appends the new asset name with "Copy x" where x is the sequential copy number.

**Note:** To avoid naming conflicts with duplicate assets, rename assets with a "Copy x" suffix.

When you copy an asset with a schedule, the schedule is removed from the copied asset.

You can copy up to 1,000 objects at a time.

Perform the following steps to copy an object:

1. On the **Explore** page, navigate to the object that you want to copy.
2. In the row that contains the object that you want to copy, click **Actions** and select **Copy To**.
3. Browse to the new location and click **Select**.

## Moving folders and assets

You can move folders and assets on the **Explore** page.

1. On the **Explore** page, navigate to the folder or assets that you want to move.
2. If your organization uses source control, check out the folder or assets that you want to move.  
If you want to move a folder, be sure to check out the folder and each of the assets within the folder.
3. To move a folder or a single asset, in the row that contains the folder or asset, click **Actions** and select **Move To**, and then browse to the new location and click **Select**.

## Renaming projects, folders, and assets

You can rename projects, folders, and assets without losing references to objects that they use.

For example, if an asset named `mt_ResolveClientList` uses an asset named `m_RegionToMainList`, you can rename the `mt_ResolveClientList` asset to `mt_ClientList` and it will still reference the `m_RegToMainList` asset.

You can't use control characters or the following special characters in project, folder, asset, or tag names:

# ? ' | { } " ^ & [ ] / \

1. On the **Explore** page, navigate to the object that you want to rename.
2. If your organization has enabled source control, check out the object that you want to rename.
3. To rename an asset, in the row that contains the asset, click **Actions** and select **Rename**.
4. To rename a project or folder, in the row that contains the project or folder, click **Actions** and select **Properties**.
5. Enter the new name and click **Save**.  
You can't use the same name as another object that is in the same folder.
6. If the object was checked out, check in the object so that the change is reflected in the Git repository.

# Deleting projects, folders, and assets

You can delete a project, folder, or asset if you no longer need it. However, before you delete it, verify that no users in the organization plan to use it. You cannot retrieve projects, folders, or assets after you delete them.

You cannot delete an asset in the following situations:

- The asset is a task that is currently running.
- The asset is a mapping that is currently running.
- The asset is used by another asset. You must first delete the dependencies of the asset before you can delete the asset.

For information about viewing asset dependencies, see [“Asset dependencies” on page 51](#).

Delete a project, folder, or asset from the **Explore** page, as shown in the following image:

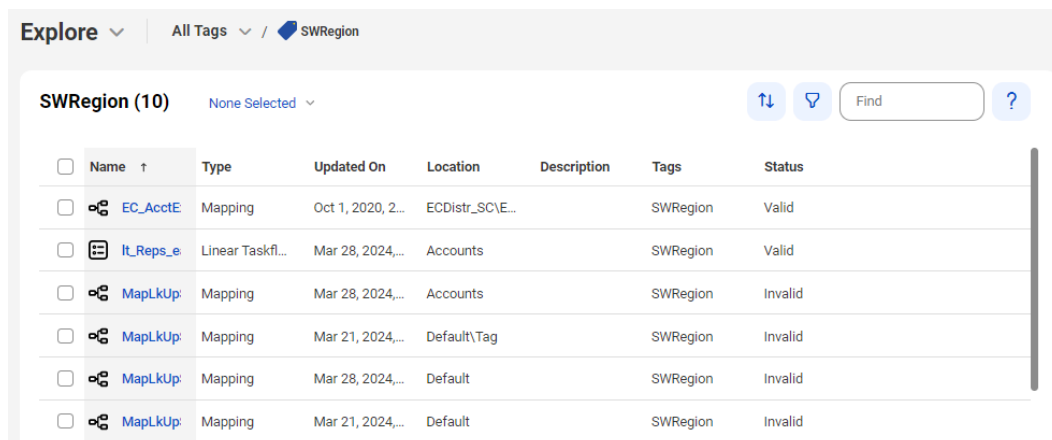
1. On the **Explore** page, navigate to the object that you want to delete.
2. If your organization enabled source control, check out the object that you want to delete.
3. In the row that contains the project, folder, or asset, click **Actions** and select **Delete**.
4. If the object was checked out, check in the object so that the change is reflected in the Git repository.

## Tags

A tag is an asset property that you can use to group assets. Create tags to filter for assets that share a common attribute on the **Explore** page.

For example, each of your organization's assets includes a tag that identifies the regional office that manages the asset. You want to view all of the assets that the Southwest regional office manages. On the **Explore** page, you explore by tag and then click the SWRegion tag.

The following image shows this configuration:



The screenshot shows the 'Explore' page with a filter set to 'All Tags' and 'SWRegion'. The table displays 10 assets, all tagged with 'SWRegion'. The table has columns for Name, Type, Updated On, Location, Description, Tags, and Status. The first row is 'EC\_AcctE' (Mapping, Valid). The second row is 'It\_Reps\_e' (Linear Taskf..., Valid). The remaining rows are 'MapLkUp' (Mapping, Invalid).

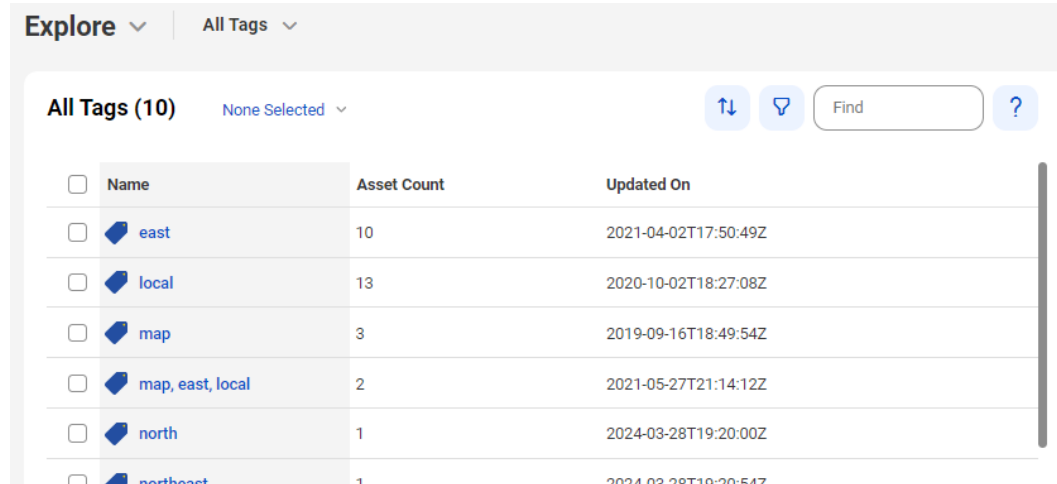
<input type="checkbox"/>	Name ↑	Type	Updated On	Location	Description	Tags	Status
<input type="checkbox"/>	EC_AcctE	Mapping	Oct 1, 2020, 2...	ECDistr_SC\E...		SWRegion	Valid
<input type="checkbox"/>	It_Reps_e	Linear Taskf...	Mar 28, 2024, ...	Accounts		SWRegion	Valid
<input type="checkbox"/>	MapLkUp	Mapping	Mar 28, 2024, ...	Accounts		SWRegion	Invalid
<input type="checkbox"/>	MapLkUp	Mapping	Mar 21, 2024, ...	Default\Tag		SWRegion	Invalid
<input type="checkbox"/>	MapLkUp	Mapping	Mar 28, 2024, ...	Default		SWRegion	Invalid
<input type="checkbox"/>	MapLkUp	Mapping	Mar 21, 2024, ...	Default		SWRegion	Invalid







You can assign tags to all asset types. You must have permissions to assign tags to assets. An asset can have up to 64 tags.

You can find all of the assets that have a particular tag using one of the following methods:

- Click the name of the tag in the **Tags** column, in any row.
- Explore by tag, and then in the list of tags that shows on the page, click the name of the tag.

The following image shows an **Explore** page that lists all the tags created for the organization:



<input type="checkbox"/>	Name	Asset Count	Updated On
<input type="checkbox"/>	 east	10	2021-04-02T17:50:49Z
<input type="checkbox"/>	 local	13	2020-10-02T18:27:08Z
<input type="checkbox"/>	 map	3	2019-09-16T18:49:54Z
<input type="checkbox"/>	 map, east, local	2	2021-05-27T21:14:12Z
<input type="checkbox"/>	 north	1	2024-03-28T19:20:00Z
<input type="checkbox"/>	 northeast	1	2024-03-28T19:20:54Z

## Creating tags

Use an asset's **Properties** dialog box to create and assign tags for that asset or to create tags to be available for future use.

Perform the following steps to create multiple tags without assigning them to an asset:

1. On the **Explore** page, browse by asset type.
2. In a row that contains an asset, click **Actions** and select **Properties**.
3. In the **Tags** field, enter the name of a tag that you want to create, and then press Enter.

A tag can have a maximum of 255 characters.

You can't use control characters or the following special characters in project, folder, asset, or tag names:

# ? ' | { } " ^ & [ ] / \



- Continue to enter the desired tags. Press Enter after each tag name to add it to the tag list.

Properties: m\_TrimEmployeeNames\_Parameterized-Advanced



Name: m\_TrimEmployeeNames\_Parameterized-  
Advanced

Description:

Tags:

Save

Cancel

- After you have entered the tags, delete the tags from the **Tags** field so that the asset does not become associated with the tags. The tags will still appear in the list of available tags.
- Click **Save**.

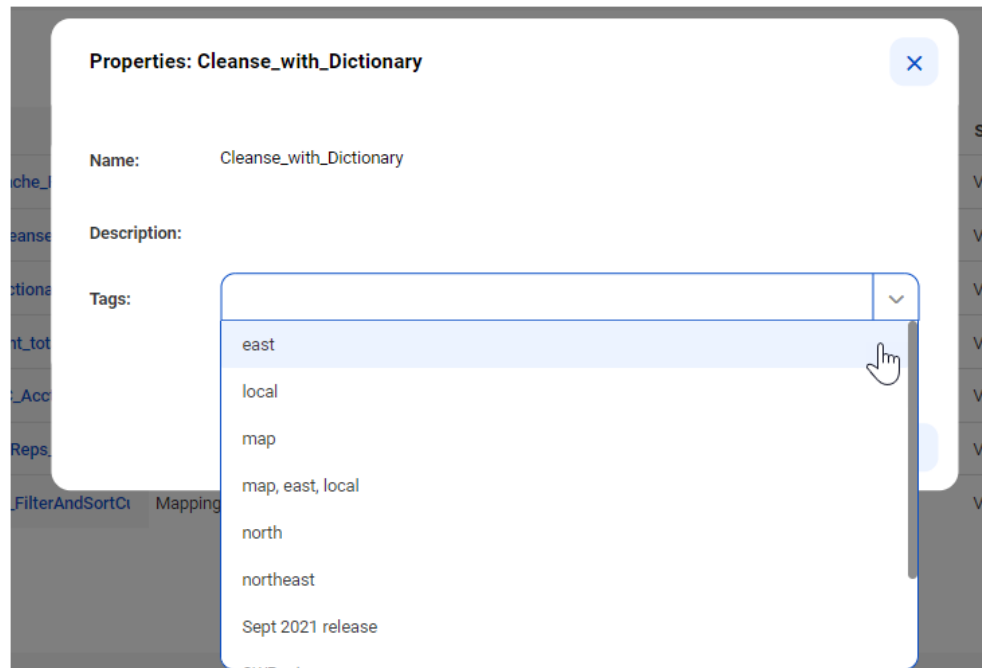
## Assigning tags

You can assign a tag to one asset at a time or assign a tag to multiple assets at the same time. You can also assign multiple tags to one asset.

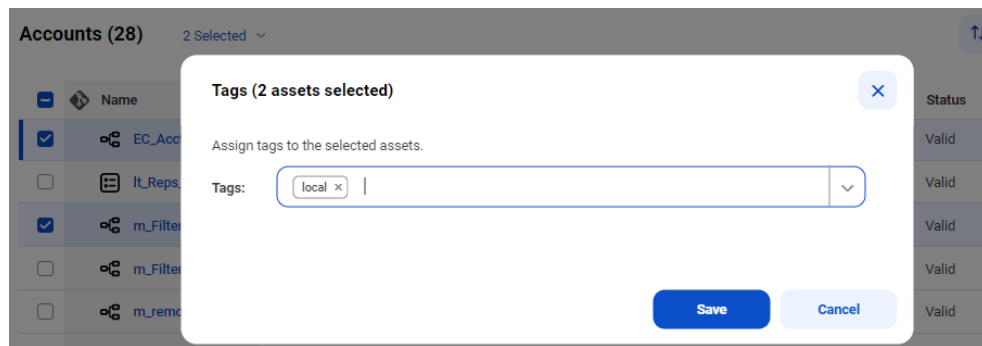
When you assign tags to an asset, you can choose an existing tag or create a new one.

- On the **Explore** page, navigate to the asset or assets.

2. Perform one of the following tasks depending on whether you want to assign tags to one asset or assign tags to multiple assets at the same time.
  - To assign tags to one asset, in the row that contains the asset, click **Actions** and select **Properties**.



- To assign tags to multiple assets at the same time, in the row for each asset, select the check box. After you have selected all of the assets, from the Selection menu, select **Tags**.



3. Select an existing tag or enter the name of a new tag.  
Continue adding tags or creating new tags until you have assigned all of the desired tags.
4. Click **Save**.

## Editing and deleting tags

You can edit or delete a tag on the **Explore** page.

Edit a tag name or description in the tag properties. When you edit a tag, the properties for associated assets update as well. For example, if your `m_sales` asset has the `NorthWest` tag and you change the name of the tag to `NW`, the name of the tag changes to `NW` in the `m_sales` asset properties.

If you delete a tag, the tag no longer appears in the asset properties.

1. On the **Explore** page, browse by tags.

2. In the row that contains the tag, perform one of the following tasks:
  - To edit a tag, click **Actions** and select **Edit**. After you make your changes, click **Save**.
  - To delete a tag, click **Actions** and select **Delete**.

## Asset dependencies

You can view object dependencies for an asset. You might want to view object dependencies before performing certain operations on an asset.

For example, you can't delete an asset if another object depends on the asset. You must first delete the dependent objects and then delete the asset. You can find the dependent objects by viewing the asset dependencies.

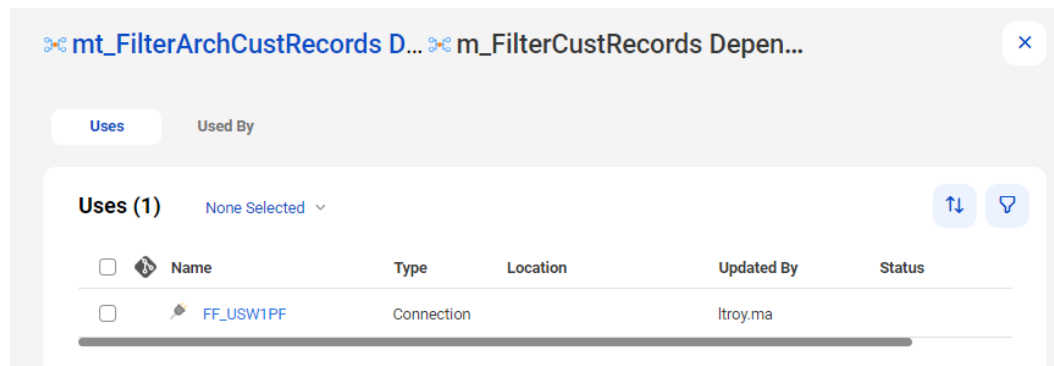
You can view object dependencies for an asset on the **Explore** page. To view object dependencies for an asset, in the row that contains the asset, click **Actions** and select **Show Dependencies**. The **Dependencies** page opens showing the **Uses** tab by default.

The **Uses** tab lists the objects that the selected asset uses.

The **Used By** tab lists the objects that use the selected asset.

To drill down to the lowest level dependency, you can continue to show dependencies for each asset that appears on the **Dependencies** page. At the top of the **Dependencies** page, a breadcrumb shows the chain of dependencies.

The following image shows that the asset `mt_FilterArchCustRecords` is dependent on `m_FilterCustRecords`, which is dependent on `FF_USW1PF`:



If you have the appropriate permissions, you can perform actions on the **Dependencies** page such as viewing or deleting assets. To view or delete an asset, in the row that contains the asset, click **Actions** and select the action.

If you work with source controlled assets, you can view source control information such as the last pull time and the last check-in. To view source control information, you can add the following source control columns to the table:

- Last Pull Time
- Checked Out By
- Last Check in
- Git Hash

# Permissions

Permissions determine the access rights that a user has for a Secure Agent, Secure Agent group, connection, schedule, or asset. Permissions add additional or custom security for an object. Permissions define which users and groups can read, update, delete, execute, and change permissions on the object.

The role assigned to your user account or to a group in which you are a member must have the Set Permission privilege for the object type. For example, to configure permissions on a Secure Agent, you must be assigned a role that has the Set Permission privilege for Secure Agents.

To configure permissions on an object, navigate to the object and set the appropriate permissions. For example, you want only users in the Development Team user group to have access to assets in the Development Data folder. Navigate to the folder, edit the permissions, and grant the Development Team user group permissions on the folder.

Permissions apply to the objects that you configure but not to copies of the object. Therefore, when you copy or export an asset, the permissions are not copied or exported with the asset. For example, you export a mapping task in which only user rjones has execute permission. When you import the mapping task, the imported mapping has no permissions assigned to it. Therefore, any user with privileges to run mapping tasks can run the imported task.

You can configure the following permissions on an object:

Permission	Description
Read	Open and view the object. If the object is source controlled, this permission allows the user or group to pull or check out the object from the source control repository. You must have the read permission to access the integration hub connection to perform any operations. If you select a task, this permission also allows the user or group to use a connection or schedule in the task.
Update	Edit the object. If the object is source controlled, this permission allows the user or group to check in, check out, pull, unlink, or roll back the object. Requires read permission, which is automatically granted.
Delete	Delete the object.
Execute	Run the object. Applies to mappings, tasks, taskflows, and Cloud Integration Hub assets. Monitor, stop, and restart instances of the mapping, task, or taskflow.
Change permissions	Change the permissions that are assigned to the object.

**Note:** These permissions control permissions within Informatica Intelligent Cloud Services. They do not control operating system permissions, such as the ability to start, stop, or configure the Secure Agent on Windows or Linux.

# Rules and Guidelines for Permissions

Use the following rules and guidelines for permissions:

- When you configure permissions for an object, verify that the user or group to which you grant permissions is assigned a role with the appropriate privileges for the object type. For example, if you grant a user with the Service Consumer role Update privilege on a particular folder, the user cannot update the folder because the Service Consumer role does not have update privileges for folders.
- To edit an asset, the user must have read permission for all assets used within the asset. For example, when you assign a user Read and Update permissions for a partner, verify that the user also has Read permission for the mappings and schedules associated with the partner.

## Configuring permissions

You can configure permissions on an object if you are assigned a role with the Set Permission privilege for the object type. For example, to configure permissions on a folder, you must be assigned a role that has the Set Permission privilege for folders.

1. Navigate to the object for which you want to configure permissions.

For example:

- To configure permissions on a Secure Agent or Secure Agent group, in Administrator, select **Runtime Environments**.
  - To configure permissions on a connection, in Administrator, select **Connections**.
  - To configure permissions on a mapping, in Data Integration, open the project and folder that contain the mapping.
2. In the row that contains the object, either click **Actions** and select **Permissions**, or click the **Change Permission** icon.

The **Permissions** dialog box lists the users and groups that have permissions on the object.

If the **Permissions** dialog box lists no users or groups, then no permissions are configured for the object. Any user with appropriate privileges for the object type can access the object.

The following image shows the **Permissions** dialog box for a mapping:

Permissions: m\_FilterAndSortCustRecords

↶ ↷ ✕

Users and Groups with permissions on the asset are listed here. Other Users have no access to the asset. If no Users or Groups are listed, then this asset has no permissions restrictions.

UsersGroups

↕

<input type="checkbox"/>	User Name	First Name	Last Name	Read	Update	Delete	Execute	Change Per...
<input type="checkbox"/>	jsmith	John	Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	jrandolp	Jane	Randolph	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add

Remove

?

Save

Cancel

3. To configure user permissions on the object:

- a. Select **Users**.
- b. If the user does not appear in the **Users** list, click **Add**, and select a user.
- c. Enable or disable the appropriate permissions on the user.

**Note:** When you grant any user permissions on the object, Informatica Intelligent Cloud Services also adds you as a user with permissions on the object. This prevents you from losing access to the object when you configure permissions.

4. To configure user group permissions on the object:

- a. Select **Groups**.
- b. If the group does not appear in the **Groups** list, click **Add**, and select a group.
- c. Enable or disable the appropriate permissions on the group.

**Note:** When you grant any group permissions on the object, Informatica Intelligent Cloud Services also adds you as a user with permissions on the object. This prevents you from losing access to the object when you configure permissions.

5. To remove all permissions restrictions for the object, remove all users and groups from the **Permissions** dialog box.

When you remove all users and groups, any user with appropriate privileges for the object type can access the object.

6. Click **Save**.

## Asset migration

You can migrate Informatica Intelligent Cloud Services assets from one organization to another organization. To migrate assets, you export the assets from the source organization and then import the assets into the target organization.

You can export single assets, groups of assets, or export all of the assets in a project. If you export a project or folder, the file structure remains intact so that when you perform the import in the target organization, you can duplicate the original structure.

To export or import assets in a sub-organization, log in to the sub-organization. If you have administrator privileges in the parent organization, you can also switch to the sub-organization and export or import assets.

## Dependent objects

Dependent objects are assets that are required by other assets.

When you set up an export, you have the option to include or exclude dependent objects in the export file. The dependent objects must exist either in the export file or in the target organization, else the import fails.

You might want to include dependent objects if they do not exist in the target organization. Or, you might want to include dependent objects if you want to replace the dependent objects in the target organization with updated versions from the source organization. If you choose to include dependent objects, the export file includes dependent objects for all of the assets that you include in the export. When you configure the import, you can choose which dependent assets to import.

You might want to exclude an asset's dependent objects if the objects exist in the target organization and you do not want to replace them.

**Note:** Schedules are not dependent objects and are not included when you export assets that use them.

## Asset export

When you export assets, Informatica Intelligent Cloud Services creates an export ZIP file that contains the assets that you selected for export.

You can select individual assets to export, or you can select an entire project or folder. When you export a project or folder, the export file includes all of the assets in the project or folder.

To export an asset, you need the following privileges and permissions:

- Your user role must have privileges to export assets.
- You must have read permission on the asset.

**Note:** Informatica recommends that you include no more than 1000 objects in an export file.

### Exporting assets

You can select a single asset, multiple assets, or a project to export.

To include multiple assets, you can either select each asset within a folder or select a project or folder to export all of its assets. If you export a project, during import you can import the entire project or import only the assets that you select.

1. Log in to the source organization.
2. On the **Explore** page, navigate to the assets that you want to export.
3. Select the assets that you want to export.

To export a single asset or project, select the asset or project, and then click **Actions** and select **Export**.

To export multiple assets, select the check box to the left of each asset to export. Or, select the check box for each project or folder that contains the assets to export. From the Actions menu, select **Export**.

The following image shows the selection menu with multiple assets selected:

4. On the **Export Assets** page, change the job name or leave the default.
5. Select whether to include dependent objects for the assets.
6. Click **Export**.
7. To see the progress of the job, select **My Import/Export Logs** from the navigation bar and then select **Export** from the menu at the top of the page. Click the name of the log to open the log details page.

## Asset import

You can import all of the assets in an export file or select the assets that you want to import.

When you import assets, you specify the following information:

- The assets in the export file that you want to import and the projects in which to import them.
- Whether to overwrite assets in the target project with assets in the export file when there is a name conflict.
- Whether to merge tags when you overwrite assets in the target project.

To import an asset, you need the following privileges and permissions:

- Your user role must have privileges to import assets.

- If you import an asset into the target project as a new asset, you must have create, update, and read permissions on the asset.
- If you overwrite an asset in the target project, you must have update and read permissions on the asset.

**Note:** To overwrite a source-controlled asset in the target project, the asset must be checked out.

The **Import Assets** page lists the assets that are in the export file. You can select which assets you want to import, and then specify which project to import the assets to. You can accept the default project, which is the same project name as the source project, or you can select a different project. If the project does not exist in the target organization, Informatica Intelligent Cloud Services creates it.

## Importing assets

Import assets from an Informatica Intelligent Cloud Services export file.

1. Log in to the target organization.
2. On the **Explore** page, navigate to **All Projects** and click **Import**.
3. On the **Import Assets** page, navigate to the export file and click **Open**, or drag the zip file from the Downloads folder in Windows.  
The **Import Assets** page lists the assets in the file.
4. Optionally, change the import job name.
5. Choose whether to overwrite existing assets with the assets in the import.
  - If you choose to overwrite existing assets, when an asset has the same name as an asset in the target project, the asset replaces the existing asset in the target project.
  - If you do not choose this option, if an asset with the same name exists in the target project, the asset is not imported.
6. Select the assets to import.  
If the export file contains a project and you want to import the entire project, select all of the assets. Informatica Intelligent Cloud Services creates the project in the target organization.
7. Select the target project or accept the default.
8. Click **Test** to see the potential results of the import.  
In the Select Assets area, the status for each asset shows the action that the service performs when you import the files.
9. If necessary, revise your selections to resolve any issues in the test results.
10. Click **Import**.  
You can see the progress of the import on the **Import** tab of the **My Import/Export Logs** page. When the import process is complete, a message appears in **Notifications**. Click the link in the message to open the log details page and see the results of the import.

## Post-import tasks

To complete the migration process you need to perform certain tasks based on the types of assets that you imported.

Perform the following tasks after you import assets:

- Configure connection passwords and security tokens. Informatica Intelligent Cloud Services does not include connection passwords and security tokens in imports for security reasons.



## Monitoring imports and exports

You can monitor the imports that are running or have run in your organization. Each time that you import or export objects, Informatica Intelligent Cloud Services creates a log entry for the import or export.

You can view the import and export logs on the following pages:

### **My Import/Export Logs page**

Lists all imports and exports started by the currently logged in user. If you view your exports, you can download the export files from this page.

To open the My Import/Export logs page, in B2B Gateway, click **My Import/Export Logs**.

### **Import/Export Logs page**

Lists all imports and exports that are running or have run in the organization. If you view exports, you can download the export files from this page.

To open the Import/Export Logs page, open Monitor, click **Import/Export Logs**.

### **Details page**

Displays detailed information about a specific import or export instance. You can also download the import or export instance log file. The log contains instance and object-level details. Logs are available for download for seven days. If you view details for an export instance, you can download the export file from this page. To open the details page, click an import or export instance on the My Import/Export Logs or Import/Export Logs page.

For more information about monitoring imports and exports, see the Monitor service help.

## CHAPTER 4

# EDI X12 and EDIFACT Messages

B2B Gateway uses Data Integration mappings to process EDI and EDIFACT messages that you exchange with your partners.

### Inbound EDI X12 and EDIFACT messages

B2B Gateway runs pre-packaged, EDI processing mappings to handle the connectivity between the partner and the B2B Gateway document store. You can define custom backend processing mappings to process the interface file that the EDI processing mapping places on the document store to the backend system.

You can define a single process-to-backend mapping to process all interface files, a mapping for each type of file that you want to process, or both mapping types. When an inbound process runs, B2B Gateway first runs the process-to-backend mappings that are defined for specific message types, and then it runs the process-to-backend mapping that is defined for the inbound flow of the partner.

### Outbound EDI X12 and EDIFACT messages

For an outbound flow, you must define custom backend processing mappings to extract and process the data to send to the partner from the backend system to an interface file on the B2B Gateway document store. You can define a single process-from-backend mapping to process all the messages to the interface file, a mapping for each type of file that you want to process, or both mapping types. When an outbound process runs, B2B Gateway first runs the process-from-backend mappings that are defined for specific message types, and then it runs the process-from-backend mapping that is defined for the outbound flow of the partner.

B2B Gateway then runs the pre-packaged, EDI processing mappings to generate valid EDI messages and to handle the connectivity between the document store and the partner.

**Note:** For both inbound and outbound flows, define each message type in one mapping only. If you define the same message type in both a message-specific backend processing mapping and in the flow's backend processing mapping, B2B Gateway might run messages of that message type twice. For example, if you define a process-from-backend mapping for the *810 Invoice* message type for a customer, and *810 Invoice* is also defined in the process-from-backend mapping that is defined for the outbound flow of the customer, B2B Gateway might run *810 Invoice* messages twice.

When you create a partner, you define the partner interchange qualifier and identifiers, B2B Gateway uses the interchange qualifier and identifiers in inbound flows to verify the interchange qualifier and identifier in inbound partner messages. If the qualifier and identifier in inbound partner messages are not identical to those that you define for the partner, B2B Gateway rejects the messages.

You can use context parameters in custom mappings to add information from the gateway to inbound and outbound messages and to filter the data in inbound and outbound messages. For example, add the partner name to inbound messages, or filter outbound messages based on partner number.

# Control numbers in outbound messages

B2B Gateway adds an interchange control number and a group control number to outbound EDI X12 and EDIFACT messages, including outgoing acknowledgments. The control numbers uniquely identify the message or acknowledgement.

You can use the following types of control numbers:

- **Event IDs.** B2B Gateway adds the file event ID as both the interchange control number and group control number to outbound messages and acknowledgments.
- **Sequence numbers.** You define the initial interchange control and group control numbers that start the sequences. B2B Gateway adds the initial interchange control and group control numbers to the first outbound message or acknowledgement, and increments the numbers sequentially for subsequent messages.

You select the type of control numbers to use when you define the outbound flow for a partner.

You can reset a control number sequence at any time by editing the initial control number. After you reset an initial control number, the sequence restarts with the new initial number. The allowed number of digits in a control number is nine digits for EDI X12 messages and 14 digits for EDIFACT messages.

**Tip:** Reset the interchange control number when the number of digits in the next expected number is about to reach the maximum allowed number of digits in control numbers.

When the sequence restarts, B2B Gateway doesn't retain the correlation between messages and message acknowledgments for messages that were sent before the sequence restart.

## Partner interchange IDs

B2B Gateway adds a partner interchange ID to all EDI X12 and EDIFACT messages, including outgoing acknowledgments.

In inbound messages, B2B Gateway adds the ID as the interchange sender ID. In outbound messages, B2B Gateway adds the ID as the interchange receiver ID. In acknowledgments, B2B Gateway returns the interchange sender ID that it received in the message that it acknowledges.

When you create a partner, you need to define at least one type of partner interchange ID. You can define an interchange production ID, an interchange test ID, or both.

To identify segments within the partner organization, you can define multiple partner interchange production IDs and multiple interchange test IDs. For example, define an ID for each department in the partner organization that you exchange EDI X12 and EDIFACT messages with. You can define up to 50 interchange production IDs and 50 interchange test IDs for a partner.

If you define multiple interchange IDs of the same type for a partner, you must pass the interchange ID to use in outbound flows as a parameter in the process-from-backend mapping that you assign to the partner, so that B2B Gateway can determine which partner interchange ID to use in outbound flows. You add the ID to the source that contains the message details and map it to the appropriate field in the mapping target. For more information, see [“Creating a process-from-backend mapping for outbound EDI message flows” on page 82](#).

If B2B Gateway can't determine which partner interchange ID to use in outbound flows, it can't run outbound flows and the flows fail. B2B Gateway can't determine which partner interchange ID to use if you don't define an interchange ID in the mapping when the partner interchange IDs have one of the following configurations:

- Multiple IDs are defined for both the interchange production ID and the interchange test ID.
- Multiple IDs are defined for one type of interchange ID and the other type of the interchange ID isn't defined. For example, if you define multiple IDs for the interchange production ID and don't define the interchange test ID.

B2B Gateway passes the sender interchange ID and qualifier to the target of the mapping which runs the inbound flow that receives the message. If you use a process-to-backend mapping in the inbound flow, you can map the sender interchange ID and qualifier from the mapping source to the backend target.

## Reconciliation in EDIFACT and EDI X12 outbound messages

With B2B Gateway, you can reconcile EDIFACT and EDI X12 outbound messages that are received or sent to partners. The reconciliation occurs with the acknowledgment for the outbound message received from the partners.

For the reconciliation to take place, at least one of the **Request functional acknowledgement** and **Request technical acknowledgement** fields on the **Outbound** tab must be selected. In EDI X12, both the fields are selected by default. In the EDIFACT outbound messaging, the **Request functional acknowledgement** field is selected by default.

If you don't want to reconcile the messages, you must clear both the fields. If the **Request functional acknowledgement** and **Request technical acknowledgement** fields are not selected, outbound event changes to **Complete** or **Error**. In such cases, when an acknowledgment message is received from the partner, the acknowledgment message is processed but the event displays a **Warning** status.

If one of the fields is selected, the event status for outbound files displays the **Waiting for Acknowledgment** status until the technical and functional acknowledgments are received and reconciled. If the acknowledgment was received, the status of the corresponding outbound event changes to **Complete** or **Error** based on the information in the acknowledgement message.

Based on the event ID or the sequence number specific to the event, you can identify the relevant outbound file that needs to be reconciled with the received acknowledgment.

The following image shows the **Outbound** tab with the **Request functional acknowledgement** and **Request technical acknowledgement** fields for EDIFACT:

Edifact\_22-10-06-KFV

< Back Next > Save Run

1 General 2 Messages 3 Inbound 4 Outbound 5 Outbound Acknowledgment

Data Element Separator +

Repetition Separator \*

Component Element Separator :

Segment Terminator ' ☐ Add new line

Decimal Mark .

Release Character ?

Control Number Use sequence numbers

Interchange Control Number 0 (Next expected number 1) [Edit Initial Number](#)

Group Control Number 0 (Next expected number 0) [Edit Initial Number](#)

☐ Add UNG group header

☐ Request technical acknowledgment

☒ Request functional acknowledgment

The following image shows the **Outbound** tab with the **Request functional acknowledgement** and **Request technical acknowledgement** fields for EDI X12:

EDI X12 52

< Back Next > Save Run

1 General 2 Messages 3 Inbound 4 Outbound 5 Outbound Acknowledgment

Message Details

Data Element Separator \*

Repetition Separator (ISA11) \*

Component Element Separator (ISA16) :

Segment Terminator ~ ☐ Add new line

Control Number Use event ID

☒ Request technical acknowledgment (TA1)

☒ Request functional acknowledgment (997)

In the **Events** page, all the events for received acknowledgments will be marked with the inbound acknowledgment file icon as shown in the following image:

Events

Events (1-6 of 6) , Last 24 hours

Updated 05/09/23 02:50:26 PM

File Name, Partner Name

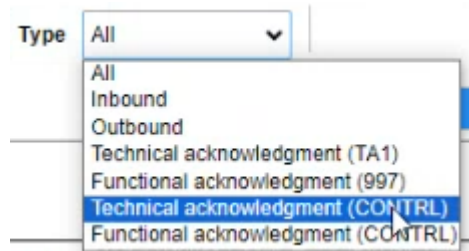
Message: Type All Number Number Partners 2 partners Select Partners... Display deleted partners Partner Tags Partner Tags Event: Event id Type All

Status All Time Last 24 hours

Filter Name Recon Save Filter Set Filter As Default Filters

File Name	Partner Name	Event ID	Time	Status	Acknowledgment
edifact Contrl 15068061.txt	1EdifactHappyBandOB_rah_test	15068065	05/09/2023 02:48:30 PM	✓	
edifact Contrl 15068061.txt	1EdifactHappyBandOB_rah_test	15067043	05/09/2023 02:45:42 PM	✗	
invoic_edifact_outbound.edi	SendackBackToPartner_rah_test	15068061	05/09/2023 02:40:40 PM	✓	Functional CONTRL event number 15068065
invoic_edifact_outbound.edi	1EdifactHappyBandOB_rah_test	15068050	05/09/2023 02:32:49 PM	✓	Func Contrl
edifact Tech.txt	1EdifactHappyBandOB_rah_test	15068047	05/09/2023 02:23:35 PM	✓	
invoic_edifact_outbound.edi	1EdifactHappyBandOB_rah_test	15067035	05/09/2023 02:17:17 PM	✓	Tech Contrl

The **Type** field in the **Events** page includes the **Technical acknowledgment (CONTRL)** and **Functional acknowledgment (CONTRL)** types that you can use to filter EDIFACT outbound messages.



## Interface files for EDI X12 and EDIFACT messages

When you exchange EDI X12 and EDIFACT messages with your partners, B2B Gateway uses XML interface files between the custom mappings and the pre-packaged EDI processing mappings. The XML interface files use the structure and naming conventions from the EDI X12 and EDIFACT standards.

When you receive EDI and EDIFACT messages from partners, the pre-packaged, EDI processing mappings validate the inbound messages and convert them to XML interface files, one file for each message type.

To send messages to partners, you create interface files and place them on B2B Gateway. You create an interface file for each type of message that you send to partners. The gateway creates a valid EDI message file for each interface file and sends the message files to the partners.

The structure and elements of an interface file reflect the structure and elements of the relevant EDI X12 or EDIFACT standard for the specific message type. For example:

- For an EDI X12 outbound message for message type 810, the interface file reflects the structure for message type 810.
- For an EDIFACT inbound message for message type ORDERS, the interface file reflects the structure for message type ORDERS.

The pre-packaged schemas for B2B Gateway can be loaded into Data Integration during organization provisioning, or any time after provisioning. The pre-packaged schemas are used in the Hierarchy Parser and the Hierarchy Builder transformations to define the expected structure of an inbound or outbound interface file. Each message type and version has its own schema. Before you create an interface file, study the schema for the message type so that you structure the hierarchy correctly.

## Structure of the interface file for EDI messages

The interface file for a specific EDI message uses the structure and naming conventions from the EDI X12 or EDIFACT standard for that message.

The EDI interface file contains the following root element:

- EDI X12: `<interchanges>` element.
- EDIFACT: `<interchange>` element.

Within the root element is a message type element, for example `<x12:TS_810>` in EDI X12 or `<TS_INVOIC>` in EDIFACT, and loop elements, segment elements, and data elements. For each element in the standard, there

is a matching element in the interface file. The loop, segment, and data elements use the naming conventions in the EDI X12 or EDIFACT standard.

## Structure of segment

In the interface file, the segment element uses the segment ID as the name of the corresponding XML element. Data elements within the segment use the reference element ID with the prefix **R** as the name of the corresponding XML element.

The following XML shows the syntax of a segment element that contains data elements:

```
<segment ID>
  <data element reference ID>...</data element reference ID>
  <data element reference ID>...</data element reference ID>
  <data element reference ID>...</data element reference ID>
  ...
</segment ID>
```

### Example of an EDI X12 segment

As an example, in the 810 message, the segment ID for the Transaction Set Header segment is ST. The segment contains three data elements. The following table describes the data elements according to the EDI X12 standard:

Name of data element	Reference element ID
Transaction Set Identifier Code	01
Transaction Set Control Number	02
Implementation Convention Reference	03

The following XML represents the Transaction Set Header segment in the interface file:

```
<ST>
  <R01>810</R01>
  <R02>1131</R02>
  <R03>005030</R03>
</ST>
```

### Example of an EDIFACT segment

As an example, in the INVOIC message, the segment ID for the UNH Message Header segment is UNH. The segment contains seven data elements. The following table describes the data elements according to the EDIFACT standard:

Name of data element	Reference element ID
Message reference number	010
MESSAGE IDENTIFIER	020
Common access reference	030
STATUS OF THE TRANSFER	040
MESSAGE SUBJECT IDENTIFICATION	050

Name of data element	Reference element ID
MESSAGE IMPLEMENTATION GUIDELINE IDENTIFICATION	060
SCENARIO IDENTIFICATION	070

The following XML represents the UNH Message Header segment in the interface file:

```
<UNH>
  <R01>1</R01>
  <R02>
    <R01>DELFOR</R01>
    <R02>D</R02>
    <R03>97A</R03>
    <R04>UN</R04>
    <R05>A09041</R05>
  </R02>
</UNH>
```

## Structure of loop

The loop element uses the loop ID from the EDI standard as the name of the corresponding loop XML element with the prefix **LOOP\_**.

The following XML shows the syntax of a loop element that contains segments with data elements:

```
<LOOP_loop ID>
  <segment ID>
    <data element reference ID>...</data element reference ID>
    <data element reference ID>...</data element reference ID>
    <data element reference ID>...</data element reference ID>
    ...
  </segment ID>
  <segment ID>
    <data element reference ID>...</data element reference ID>
    <data element reference ID>...</data element reference ID>
    <data element reference ID>...</data element reference ID>
    ...
  </segment ID>
  ...
</LOOP_loop ID>
```

## Example of an EDI X12 loop

As an example, in the outbound EDI X12 810 message, the Baseline Item Data loop (IT1) contains two segments, IT1 and TX1, and another loop, the Product/Item Description loop (PID).

The following XML represents an IT1 loop in the interface file:

```
<LOOP_IT1>
  <IT1>
    <R01>11</R01>
    <R02>1.000</R02>
    <R03>EA</R03>
    <R04>0.16</R04>
    <R06>VP</R06>
    <R07>HEA006-PHO2S-NL</R07>
  </IT1>
  <TXI>
    <R01>TX</R01>
    <R02>0.00</R02>
    <R06>2</R06>
  </TXI>
  <LOOP_PID>
    <PID>
```



```

    <R01>F</R01>
    <R05>12" X 15" ABCDEFGHIJ</R05>
  </PID>
</LOOP_PID>
</LOOP_IT1>

```

## Example of an EDIFACT loop

As an example, in the outbound EDIFACT INVOIC message, loop 26 contains three segments, LIN, IMD\_1, and QTY\_2, and two other loops, loop 27 and loop 29.

The following XML represents loop 26 in the interface file:

```

<LOOP_26>
  <LIN>
    <R01>3</R01>
    <R02></R02>
    <R03>
      <R01>4711,003</R01>
    </R03>
  </LIN>
  <IMD_1>
    <R01>F</R01>
    <R03>
      <R01></R01>
      <R02></R02>
      <R03></R03>
      <R04>replacementvalve</R04>
    </R03>
  </IMD_1>
  <QTY_2>
    <R01>
      <R01>47</R01>
      <R02>3</R02>
      <R03>PCE</R03>
    </R01>
  </QTY_2>
  <LOOP_27>
    <MOA_6>
      <R01>
        <R01>66</R01>
        <R02>7,5</R02>
      </R01>
    </MOA_6>
  </LOOP_27>
  <LOOP_29>
    <PRI>
      <R01>
        <R01>AAA</R01>
        <R02>2.5</R02>
      </R01>
    </PRI>
  </LOOP_29>
</LOOP_26>

```

## Multiple loops with the same ID

Occasionally the EDI standard contains different loops with the same loop ID. In the interface files these loops use the suffix **\_number** to distinguish between them. The number of the loop reflects the order in which it appears in the EDI standard.

The following XML shows the syntax of two different types of loop elements with the same loop ID:

```

<LOOP_loop ID_1>
  <segment ID>
    <data element reference ID>...</data element reference ID>
    <data element reference ID>...</data element reference ID>
    <data element reference ID>...</data element reference ID>
    ...

```

```

        </segment ID>
        ...
    </LOOP_loop ID_1>
    <LOOP_loop ID_2>
        <segment ID>
            <data element reference ID>...</data element reference ID>
            <data element reference ID>...</data element reference ID>
            <data element reference ID>...</data element reference ID>
            ...
        </segment ID>
        ...
    </LOOP_loop ID_2>
    ...

```

## Schemas of the interface file for EDI messages

B2B Gateway contains pre-packaged schemas that define the expected structure of an inbound or outbound interface file for EDI messages. Each message type and version has its own schema.

The schemas are located in the directory <secure\_agent\_installation>\main\rdtmDir\DT\ServiceDB, inside a project folder with the following naming convention:

```
<EDI_standard>_<EDI_version>_<message_type>_<Script object>
```

For EDI X12 messages, the Script object can be either a Parser or a Restricted Serializer (Restricted\_Serializer). For EDIFACT messages, the Script object can be a Serializer (Serializer).

If you trace through the schema of an inbound message, you can determine the relationship between the elements of the schema and the interface file. For an outbound message, use the schema to determine the expected structure of an interface file. Before you create an outbound interface file, study the relevant schema for the message type so that you structure the hierarchy correctly.

## Example of an outbound interface file for EDI X12 messages

The outbound interface file for EDI X12 messages contains a root element, message type element, loop elements, segment elements, and data elements.

The following XML represents an interface file for an outbound message of type 810:

```

<x12:interchange xmlns:x12="http://www.informatica.com/B2B/X12/4010">
  <x12:TS_810>
    <ST>
      <R01>810</R01>
      <R02>0007</R02>
    </ST>
    <BIG>
      <R01>20131025</R01>
      <R02>INV159154</R02>
      <R03>20131016</R03>
      <R04>7100124746</R04>
      <R07>FB</R07>
    </BIG>
    <LOOP_IT1>
      <IT1>
        <R01>11</R01>
        <R02>1.000</R02>
        <R03>EA</R03>
        <R04>0.16</R04>
        <R06>VP</R06>
        <R07>HEA006-PHO2S-NL</R07>
      </IT1>
      <TXI>
        <R01>TX</R01>
        <R02>0.00</R02>
        <R06>2</R06>
      </TXI>
    </LOOP_IT1>
  </x12:TS_810>
</x12:interchange>

```

```

        <LOOP_PID>
            <PID>
                <R01>F</R01>
                <R05>12" X 15" ABCDEFGHIJ</R05>
            </PID>
        </LOOP_PID>
    </LOOP_IT1>
    <LOOP_IT1>
        <IT1>
            <R01>15</R01>
            <R02>2500.05</R02>
            <R03>EA</R03>
            <R04>0.25</R04>
            <R06>VP</R06>
            <R07>ABCDEFGHIJ</R07>
        </IT1>
        <TXI>
            <R01>TX</R01>
            <R02>0.00</R02>
            <R06>2</R06>
        </TXI>
        <LOOP_PID>
            <PID>
                <R01>F</R01>
                <R05>ABCDEFGHIJ</R05>
            </PID>
        </LOOP_PID>
    </LOOP_IT1>
    <TDS>
        <R01>844969</R01>
    </TDS>
    <TXI>
        <R01>TX</R01>
        <R02>624.11</R02>
        <R06>2</R06>
    </TXI>
    <LOOP_SAC_2>
        <SAC>
            <R01>C</R01>
            <R02>D240</R02>
            <R05>89103</R05>
            <R12>06</R12>
            <R15>Freight</R15>
        </SAC>
    </LOOP_SAC_2>
    <CTT>
        <R01>7</R01>
    </CTT>
    <SE>
        <R01>19</R01>
        <R02>0007</R02>
    </SE>
</x12:TS_810>
</x12:interchange>

```

The root element for an outbound interface file is specified as `<x12:interchange>` to identify the message as an EDI X12 message. The message type element `<x12:TS_810>` identifies the message as message type 810.

If you trace through the interface file, you can determine the relationship between the elements of the file. The hierarchy contains different IT1 loop elements that contain PID loop elements, and a SAC loop element.

The interface file also contains segment elements with data elements.

## Example of an inbound interface file for EDI X12 messages

The inbound interface file for EDI X12 messages contains a root element, message type element, delimiters, loop elements, segment elements, and data elements.

The following XML represents an interface file for an inbound message of type 850:

```
<x12:interchanges xmlns:x12="http://www.informatica.com/B2B/X12/4010">
  <interchange>
    <delimiters>
      <field_separator>*</field_separator>
      <segment_separator>~</segment_separator>
      <composite_separator>^</composite_separator>
      <segment_separator_suffix>
      </segment_separator_suffix>
    </delimiters>
    <ISA>
      <R01>03</R01>
      <R02>Brett      </R02>
      <R03>01</R03>
      <R04>JoZaza      </R04>
      <R05>ZZ</R05>
      <R06>6666        </R06>
      <R07>14</R07>
      <R08>148055531ECPI </R08>
      <R09>071031</R09>
      <R10>0619</R10>
      <R11>U</R11>
      <R12>00503</R12>
      <R13>111111176</R13>
      <R14>0</R14>
      <R15>P</R15>
      <R16>^</R16>
    </ISA>
    <GS>
      <R01>PQ</R01>
      <R02>4405197800</R02>
      <R03>999999999</R03>
      <R04>20101127</R04>
      <R05>1719</R05>
      <R06>1421</R06>
      <R07>X</R07>
      <R08>004010</R08>
    </GS>
    <x12:TS_850>
      <ST>
        <R01>850</R01>
        <R02>000000010</R02>
      </ST>
      <BEG>
        <R01>00</R01>
        <R02>SA</R02>
        <R03>08292233294</R03>
        <R05>20101127</R05>
        <R06>610385385</R06>
      </BEG>
      <LOOP_P01>
        <P01>
          <R01>1</R01>
          <R02>120</R02>
          <R03>EA</R03>
          <R04>9.25</R04>
          <R05>TE</R05>
          <R06>CB</R06>
          <R07>065322-117</R07>
          <R08>PR</R08>
          <R09>RO</R09>
          <R10>VN</R10>
          <R11>AB3542</R11>
        </P01>
        <LOOP_PID>
```

```

    <PID>
      <R01>F</R01>
      <R05>SMALL WIDGET</R05>
    </PID>
  </LOOP_PID>
<PO4>
  <R01>4</R01>
  <R02>4</R02>
  <R03>EA</R03>
  <R04>PLT94</R04>
  <R06>3</R06>
  <R07>LR</R07>
  <R08>15</R08>
  <R09>CT</R09>
</PO4>
</LOOP_PO1>
<LOOP_PO1>
  <PO1>
    <R01>2</R01>
    <R02>220</R02>
    <R03>EA</R03>
    <R04>13.79</R04>
    <R05>TE</R05>
    <R06>CB</R06>
    <R07>066850-116</R07>
    <R08>PR</R08>
    <R09>RO</R09>
    <R10>VN</R10>
    <R11>RD5322</R11>
  </PO1>
</LOOP_PO1>
<LOOP_CTT>
  <CTT>
    <R01>6</R01>
  </CTT>
  <AMT>
    <R01>1</R01>
    <R02>13045.94</R02>
  </AMT>
</LOOP_CTT>
<SE>
  <R01>14</R01>
  <R02>000000010</R02>
</SE>
</x12:TS_850>
<GE>
  <R01>1</R01>
  <R02>1421</R02>
</GE>
<IEA>
  <R01>1</R01>
  <R02>000003438</R02>
</IEA>
</interchange>
</x12:interchanges>

```

If you trace through the hierarchy of the interface file, you can see that there are multiple interchanges. The hierarchy reflects the structure of the relevant message type, the schema, and the type of information that the customer sent.

You can pass the data from this interface file to a backend system for further processing.

## Example of an outbound interface file for EDIFACT messages

The outbound interface file for EDIFACT messages contains a root element, message type element, loop elements, segment elements, and data elements.

The root element for an outbound interface file is specified as <interchange> to identify the message as an EDIFACT message. In this example, the message type element <TS\_INVOIC> identifies the message as message type INVOIC.

```
<interchange>
  <TS_INVOIC>
    <UNH>
      <R01>1</R01>
      <R02>
        <R01>INVOIC</R01>
        <R02>D</R02>
        <R03>99A</R03>
        <R04>UN</R04>
        <R05>MMDR01</R05>
      </R02>
      <R03>2002</R03>
      <R04>
        <R01>1</R01>
      </R04>
    </UNH>
    <BGM>
      <R01>
        <R01>380</R01>
      </R01>
      <R02>
        <R01>9908001</R01>
      </R02>
      <R03>9</R03>
    </BGM>
    <DTM>
      <R01>
        <R01>3</R01>
        <R02>19990802</R02>
        <R03>102</R03>
      </R01>
    </DTM>
    <LOOP_1>
      <RFF>
        <R01>
          <R01>ON</R01>
          <R02>00010001</R02>
        </R01>
      </RFF>
      <DTM_1>
        <R01>
          <R01>4</R01>
          <R02>19999715</R02>
          <R03>102</R03>
        </R01>
      </DTM_1>
    </LOOP_1>
    <LOOP_2>
      <NAD>
        <R01>SE</R01>
        <R03>
          <R01>Fahrradhandelpedal</R01>
        </R03>
        <R05>
          <R01>Wagingerstr.5</R01>
        </R05>
        <R06></R06>
        <R07></R07>
        <R08>München</R08>
      </NAD>
    </LOOP_2>
```

```

<LOOP_2>
  <NAD>
    <R01>BY</R01>
    <R03>
      <R01>HuberGmbH</R01>
    </R03>
    <R05>
      <R01>Obstgasse2</R01>
    </R05>
    <R06>München</R06>
    <R07></R07>
    <R08>81549</R08>
  </NAD>
</LOOP_2>
<LOOP_26>
  <LIN>
    <R01>1</R01>
    <R02></R02>
    <R03>
      <R01>4711,001</R01>
    </R03>
  </LIN>
  <IMD_1>
    <R01>F</R01>
    <R03>
      <R01></R01>
      <R02></R02>
      <R03></R03>
      <R04>bike,ladies</R04>
    </R03>
  </IMD_1>
  <QTY_2>
    <R01>
      <R01>47</R01>
      <R02>1</R02>
      <R03>PCE</R03>
    </R01>
  </QTY_2>
  <LOOP_27>
    <MOA_6>
      <R01>
        <R01>66</R01>
        <R02>750</R02>
      </R01>
    </MOA_6>
  </LOOP_27>
  <LOOP_29>
    <PRI>
      <R01>
        <R01>AAA</R01>
        <R02>750</R02>
      </R01>
    </PRI>
  </LOOP_29>
</LOOP_26>
<LOOP_26>
  <LIN>
    <R01>2</R01>
    <R02></R02>
    <R03>
      <R01>4711,002</R01>
    </R03>
  </LIN>
  <IMD_1>
    <R01>F</R01>
    <R03>
      <R01></R01>
      <R02></R02>
      <R03></R03>
      <R04>airpump,stand</R04>
    </R03>

```

```

</IMD_1>
<QTY_2>
  <R01>
    <R01>47</R01>
    <R02>1</R02>
    <R03>PCE</R03>
  </R01>
</QTY_2>
<LOOP_27>
  <MOA_6>
    <R01>
      <R01>66</R01>
      <R02>19.9</R02>
    </R01>
  </MOA_6>
</LOOP_27>
<LOOP_29>
  <PRI>
    <R01>
      <R01>AAA</R01>
      <R02>19.9</R02>
    </R01>
  </PRI>
</LOOP_29>
</LOOP_26>
<LOOP_26>
  <LIN>
    <R01>3</R01>
    <R02></R02>
    <R03>
      <R01>4711,003</R01>
    </R03>
  </LIN>
<IMD_1>
  <R01>F</R01>
  <R03>
    <R01></R01>
    <R02></R02>
    <R03></R03>
    <R04>replacementvalve</R04>
  </R03>
</IMD_1>
<QTY_2>
  <R01>
    <R01>47</R01>
    <R02>3</R02>
    <R03>PCE</R03>
  </R01>
</QTY_2>
<LOOP_27>
  <MOA_6>
    <R01>
      <R01>66</R01>
      <R02>7,5</R02>
    </R01>
  </MOA_6>
</LOOP_27>
<LOOP_29>
  <PRI>
    <R01>
      <R01>AAA</R01>
      <R02>2.5</R02>
    </R01>
  </PRI>
</LOOP_29>
</LOOP_26>
<UNS>
  <R01>S</R01>
</UNS>
<CNT>
  <R01>

```



```

        <R01>1</R01>
        <R02>180</R02>
    </R01>
</CNT>
<LOOP_50>
    <MOA_12>
        <R01>
            <R01>79</R01>
            <R02>777.4</R02>
        </R01>
    </MOA_12>
</LOOP_50>
<LOOP_50>
    <MOA_12>
        <R01>
            <R01>124</R01>
            <R02>124.38</R02>
        </R01>
    </MOA_12>
</LOOP_50>
<LOOP_50>
    <MOA_12>
        <R01>
            <R01>128</R01>
            <R02>901.78</R02>
        </R01>
    </MOA_12>
</LOOP_50>
<LOOP_52>
    <TAX_4>
        <R01>7</R01>
        <R02>
            <R01>VAT</R01>
        </R02>
        <R04></R04>
        <R05>
            <R01></R01>
            <R02></R02>
            <R03></R03>
            <R04>16</R04>
        </R05>
        <R06>S</R06>
    </TAX_4>
</LOOP_52>
<UNT>
    <R01>28</R01>
    <R02>INVOIC0001</R02>
</UNT>
</TS_INVOIC>
</interchange>

```

## Example of an inbound interface file for EDIFACT messages

The inbound interface file for EDIFACT messages contains a root element, message type element, delimiters, loop elements, segment elements, and data elements.

The root element for an inbound interface file is specified as `<interchange>` to identify the message as an EDIFACT message. In this example, the message type element `<TS_ORDERS>` identifies the message as message type ORDERS.

```

<interchange>
  <delimiters>
    <field_separator>+</field_separator>
    <segment_separator>'</segment_separator>
    <composite_separator>:</composite_separator>
    <escape_character>?</escape_character>
  </delimiters>
  <UNA>

```

```

    <R01>:</R01>
    <R02>+</R02>
    <R03>.</R03>
    <R04>?</R04>
    <R05> </R05>
    <R06>'</R06>
  </UNA>
  <UNB>
    <R01>
      <R01>UNOC</R01>
      <R02>3</R02>
    </R01>
    <R02>
      <R01>380948745PLA001</R01>
      <R02>ZZZ</R02>
    </R02>
    <R03>
      <R01>0607047800019</R01>
      <R02>14</R02>
    </R03>
    <R04>
      <R01>160525</R01>
      <R02>1606</R02>
    </R04>
    <R05>50105153010903</R05>
    <R07>ORDERS</R07>
  </UNB>
  <TS_ORDERS>
    <UNH>
      <R01>1</R01>
      <R02>
        <R01>ORDERS</R01>
        <R02>D</R02>
        <R03>97A</R03>
        <R04>UN</R04>
      </R02>
    </UNH>
    <BGM>
      <R01>
        <R01>105</R01>
      </R01>
      <R02>
        <R01>?+4201138193</R01>
      </R02>
      <R03>9</R03>
    </BGM>
    <DTM>
      <R01>
        <R01>4</R01>
        <R02>20160425</R02>
        <R03>102</R03>
      </R01>
    </DTM>
    <DTM>
      <R01>
        <R01>2</R01>
        <R02>20160509</R02>
        <R03>102</R03>
      </R01>
    </DTM>
    <DTM>
      <R01>
        <R01>137</R01>
        <R02>20160525</R02>
        <R03>102</R03>
      </R01>
    </DTM>
  <LOOP_2>
    <NAD>
      <R01>SU</R01>
      <R02>

```

```

        <R01>1110003840</R01>
        <R02></R02>
        <R03>92</R03>
    </R02>
</NAD>
</LOOP_2>
<LOOP_2>
    <NAD>
        <R01>BY</R01>
        <R02>
            <R01>887243</R01>
            <R02></R02>
            <R03>91</R03>
        </R02>
    </NAD>
</LOOP_2>
<LOOP_2>
    <NAD>
        <R01>ST</R01>
        <R02>
            <R01>893186</R01>
            <R02></R02>
            <R03>91</R03>
        </R02>
    </NAD>
</LOOP_2>
<LOOP_7>
    <CUX>
        <R01>
            <R01>2</R01>
            <R02>PLN</R02>
            <R03>9</R03>
        </R01>
    </CUX>
</LOOP_7>
<LOOP_28>
    <LIN>
        <R01>1001</R01>
        <R02></R02>
        <R03>
            <R01></R01>
            <R02>VP</R02>
        </R03>
    </LIN>
    <PIA>
        <R01>5</R01>
        <R02>
            <R01>?+04705201</R01>
            <R02>BP</R02>
        </R02>
    </PIA>
    <PIA>
        <R01>5</R01>
        <R02>
            <R01>1 Handsets</R01>
            <R02>EN</R02>
        </R02>
    </PIA>
</LOOP_28>
<UNS>
    <R01>S</R01>
</UNS>
<UNT>
    <R01>13</R01>
    <R02>72</R02>
</UNT>
</TS_ORDERS>
<UNZ>
    <R01>1</R01>
    <R02>50105153010903</R02>

```

```
</UNZ>
</interchange>
```

If you trace through the hierarchy of the interface file, you can see that there are multiple interchanges. The hierarchy reflects the structure of the relevant message type, the schema, and the type of information that the customer sent.

You can pass the data from this interface file to a backend system for further processing.

## Data Integration mappings for EDI X12 and EDIFACT messages

B2B Gateway uses pre-packaged, EDI processing mappings to handle inbound and outbound EDI X12 and EDIFACT messages based on the flows that you assign to the partner. The EDI processing mappings handle the connectivity between the partner and the B2B Gateway document store.

You can define the following flows:

### Inbound flow

You can use custom mappings to process the interface file that the B2B Gateway EDI processing mapping generates and places on the B2B Gateway document store to the backend system. You can define a single process-to-backend mapping to process all interface files, a mapping for each type of file that you want to process, or both mapping types. When an inbound process runs, B2B Gateway first runs the process-to-backend mappings that are defined for specific message types, and then it runs the process-to-backend mapping that is defined for the inbound flow of the partner.

### Outbound flow

You can define custom backend processing mappings to extract and process the data to send to the partner from the backend system to an interface file on the B2B Gateway document store. You can define a single process-from-backend mapping to process all the messages to the interface file, a mapping for each type of file that you want to process, or both mapping types.

When an outbound process runs, B2B Gateway first runs the process-from-backend mappings that are defined for specific message types, and then it runs the process-from-backend mapping that is defined for the outbound flow of the partner. The B2B Gateway EDI processing mapping reads the messages from the B2B Gateway document store.

**Note:** For both inbound and outbound flows, define each message type in one mapping only. If you define the same message type in both a message-specific backend processing mapping and in the flow's backend processing mapping, B2B Gateway might run messages of that message type twice. For example, if you define a process-from-backend mapping for the *810 Invoice* message type for a customer, and *810 Invoice* is also defined in the process-from-backend mapping that is defined for the outbound flow of the customer, B2B Gateway might run *810 Invoice* messages twice.

## EDI processing mappings

B2B Gateway uses pre-packaged, EDI processing mappings for both inbound and outbound EDI message flows.

### EDI processing mappings for inbound EDI messages

The source of the mapping is the incoming messages, and the target is an interface file on the B2B Gateway document store. The mapping validates the EDI message, sends technical and functional

acknowledgment to the partner, converts the EDI messages to an XML interface file, and places the file in the document store.

#### EDI processing mappings for outbound EDI messages

The source of the mapping is the interface file that you place on the B2B Gateway document store, and the target is the target location for the partner to which to send the messages. The mapping enriches the data in the interface file with partner metadata, creates a valid EDI message file, and sends the file to the partner.

## Custom mappings for EDI message exchange

To send EDI messages to partners, you must create custom mappings for outbound flows. To receive EDI messages from partners, you can optionally create custom mappings for inbound flows.

#### Custom mappings for inbound EDI messages

You can use custom mappings in inbound EDI message flows to process the interface file from the B2B Gateway document store to the backend system. The source of the mappings is the interface file and the target is the backend system. The mappings use a Hierarchy Parser transformation to convert the XML interface file to relational database format and places the data in the backend system.

If you use custom mappings to process the interface file to the backend system, B2B Gateway provides end-to-end tracking of inbound messages, from the partner to the backend system. If you use a different method to process the interface file to the backend system, B2B Gateway tracks the messages from the partner to B2B Gateway and does not track the messages to the backend system.

#### Custom mappings for outbound EDI messages

Use custom mappings in outbound EDI message flows to process outgoing messages from the backend system to an interface file on the B2B Gateway document store. The source of the mappings is the backend system and the target is the B2B Gateway connection to the location of the interface file. The mappings use a Hierarchy Builder transformation to convert the data to XML format and places the data on the document store.

## Rules and guidelines for custom EDI mappings

When you develop custom Data Integration mappings to use in B2B Gateway for EDI message exchange, consider these rules and guidelines.

### General rules and guidelines

The following rules and guidelines apply to both inbound and outbound flows:

- You can create the mappings after your organization is set up in Data Integration and B2B Gateway connections are available for selection when you create the mapping.

**Warning:** When you set up the organization in B2B Gateway, B2B Gateway creates the connections **B2B EDI Gateway**, **B2B EDI Gateway Endpoint**, and **B2B Gateway Document Store** in the Informatica Intelligent Cloud Services organization. Do not rename or edit these connections. Editing a connection or changing a connection name might result in errors at run time.

- Define each message type in one mapping only. If you define the same message type in both a message-specific backend processing mapping and in the flow's backend processing mapping, B2B Gateway might run messages of that message type twice. For example, if you define a process-from-backend mapping for the *810 Invoice* message type for a customer, and *810 Invoice* is also defined in the process-from-backend mapping that is defined for the outbound flow of the customer, B2B Gateway might run *810 Invoice* messages twice.

## Rules and guidelines for inbound flows

The following rules and guidelines apply to custom mappings that you use in inbound flows:

- To use the inbound mapping option, you create process-to-backend mappings. You can define a single process-to-backend mapping to process all interface files, a mapping for each type of file that you want to process, or both mapping types. When an inbound process runs, B2B Gateway first runs the process-to-backend mappings that are defined for specific message types, and then it runs the process-to-backend mapping that is defined for the inbound flow of the partner. Message types include all the types of messages that you receive from partners. Targets include all the backend applications to which you transfer incoming messages. To handle the B2B Gateway interface file and to convert it from XML format to relational database format you add Hierarchy Parser transformations to the mappings.
- You can add multiple sources to a process-to-backend mapping. The mapping must include only one source that connects to the B2B EDI Gateway connection. You must parameterize the B2B EDI Gateway connection. You can connect other sources to any Informatica connection that isn't a B2B Gateway connection. Do not parameterize the additional connections.

**Note:** Connecting additional sources to a B2B Gateway connection or parameterizing them might result in errors at run time.

- Do not parameterize the target connection.

**Note:** Parameterizing the target connection might result in errors at run time.

- If you add parameters to the process-to-backend mapping, you can configure the mapping parameters when you create the partner flow, after you select the mapping.
- You can map the sender interchange ID and qualifier of incoming messages from the mapping source to the target. You can map the following fields:
  - SENDER\_INTERCHANGE\_ID
  - SENDER\_INTERCHANGE\_QUALIFIER

## Rules and guidelines for outbound flows

The following rules and guidelines apply to custom mappings that you use in outbound flows:

- To convert relational data to the B2B Gateway XML interface file in the outbound flow, define custom backend processing mappings to extract and process the data to send to the partner from the backend system to an interface file on the B2B Gateway document store. You can define a single process-from-backend mapping to process all the messages to the interface file, a mapping for each type of file that you want to process, or both mapping types. When an outbound process runs, B2B Gateway first runs the process-from-backend mappings that are defined for specific message types, and then it runs the process-from-backend mapping that is defined for the outbound flow of the partner. You add Hierarchy Builder transformations to the mappings.
- Do not parameterize the source connection.

**Note:** Parameterizing the source connection might result in errors at run time.
- The targets of the mapping must be the B2B EDI Gateway connection. You must parameterize the target connections.
- If you assign process-from-backend mappings to specific message types you must also create a message discovery mapping and assign it to the outbound flow of the partner.
- If you define multiple interchange IDs of the same type for a partner, you must pass the interchange ID to use in outbound flows as a parameter in the process-from-backend mapping that you assign to the partner, so that B2B Gateway can determine which partner interchange ID to use in outbound flows. You

add the ID to the source that contains the message details and map it to the appropriate field in the mapping target. For more information, see [“Partner interchange IDs” on page 59](#)

- If you add parameters to the process-from-backend mapping, you can configure the parameter values when you create the partner flow, after you select the mapping. You can also pass the parameter values with the Run Partner REST API. When you run the partner with the API, the values that you define in the API override those that you define in the partner flow. For more information, see [“Run Partner REST API” on page 138](#).

## Context parameters in custom mappings

You can use input and in-out parameters as context parameters in custom mappings to add information from the gateway to inbound and outbound messages and to filter the data in inbound and outbound messages. For example, add the partner name to inbound messages, or filter outbound messages based on partner number.

Consider the following guidelines when you add the parameters:

- Add a transformation to the mapping. You can add any transformation that accepts Data Integration parameters as input. For example, an Expression transformation or a Filter transformation.
- In outbound flows, add the transformation before the target. In inbound flows, add the transformation after the source.
- Configure ports that add the data. The following table describes the port values that you can configure. Port values are not case sensitive.

Port Value	Data to Add to the Port
PARTNER_NUMBER	Partner number
PARTNER_NAME	Partner name
PARTNER_PROD_INTERCHANGE_ID	Partner production interchange ID
PARTNER_TEST_INTERCHANGE_ID	Partner test interchange ID
EVENT_ID	Event ID

## Target fields in custom mappings

When the target connection in a mapping is GW\_TARGET, you can map incoming fields to target fields.

The following table describes the target fields that you can map incoming fields to. Target field names are not case-sensitive.

Target Field	Description
XML_FILE_PATH	Path of the XML file
DATA	Data of the XML file
FILE_NAME	Name of the XML file

Target Field	Description
PARTNER_PROD_INTERCHANGE_ID	Partner production interchange ID
PARTNER_TEST_INTERCHANGE_ID	Partner test interchange ID
PARTNER_INTERCHANGE_QUALIFIER	Partner interchange qualifier

You map incoming fields to target fields on the **Field Mapping** tab of the Target transformation.

## Creating a process-to-backend mapping for inbound EDI message flows

Create a process-to-backend mapping that processes incoming EDI messages in Data Integration.

A mapping can process a single message type or multiple message types. When you create a partner, you can select a mapping that contains a single message type when you add the message type for the partner. You can select a mapping that includes multiple message types when you define the inbound flow for the partner.

When you create a mapping you define the B2B Gateway document store as the source, add a filter for each message type in the mapping, add and configure a Hierarchy Parser transformation for each message type, and, for each message type, add the relevant backend systems as targets.

To define B2B Gateway as a source, you select the B2B EDI Gateway connection. You must parameterize the connection.

Optionally, you can add sources that connect to locations other than the document store. You can use any Informatica connection that isn't a B2B Gateway connection. Do not parameterize the connections.

**Note:** Parameterizing connections other than B2B Gateway connections might result in errors at run time.

After you add all the required elements to the mapping save and validate the mapping.

### Step 1. Create the mapping

Create the mapping for inbound flows.

1. Click **New > Mappings**, and then click **Create**.
2. In the mapping Properties panel, enter the mapping name and description, and change the location to save the mapping.

You can use alphanumeric characters and underscores (\_) in the mapping name.

### Step 2. Configure the sources

Configure the Source transformation to specify the B2B Gateway connection as the source object.

Optionally, add more sources to the mapping.

1. Click the Source transformation on the mapping canvas.
2. In the **Properties** panel, on the **General** tab, you can enter a name and description.



- Click the **Source** tab and then select the following options:

Option	Selection
Connection	B2B EDI Gateway
Source Type	Single Object
Object	GW_EDI_SOURCE

- Click **New Parameter** to the right of the **Connection** field.  
The **New Input Parameter** dialog box shows.
- Enter a parameter name and then click **OK**.  
The **New Input Parameter** dialog box closes. In the **Properties** panel, the parameter name you entered shows in the **Connection** field.  
**Note:** You must parameterize the B2B EDI Gateway connection.
- Optionally, add more Source transformations to the mapping and configure them. You can use any Informatica connection that isn't a B2B Gateway connection. Do not parameterize the connections.  
**Note:** Connecting additional sources to a B2B Gateway connection or parameterizing them might result in errors at run time.

### Step 3. Create Filter transformations

Create Filter transformations to filter source data based on the message type. Create a transformation for each type of inbound message that you want to map.

- Add a **Filter** transformation to the mapping canvas and connect the source to the **Filter** transformation.
- Click the **Filter** tab. In the **Field Name** column select **MESSAGE\_TYPE** and then, in the **Value** column, enter the value of the message type for which you create the filter.

### Step 4. Create Hierarchy Parser transformations

Create Hierarchy Parser transformations to transform source hierarchical data to relational database data. Create a transformation for each type of inbound message that you want to map.

- Add a **Hierarchy Parser** transformation to the mapping canvas and connect the **Filter** transformation of the relevant message type to the **Hierarchy Parser** transformation.
- In the **Properties** panel select the **Input Settings** tab, select the **File** input type, and then click **Select**.  
The **Select Schema** dialog box shows.
- Select the schema of the message type to add to the inbound flow. For example, if you create a mapping for an EDI X12 810 message, select the **TS\_810** level. Click **OK**.
- Click the **Input Field Selection** tab and map the field **FILE\_PATH** from the **Incoming Fields** column to the **Hierarchical Schema Input Fields** column.
- Click the **Field Mapping** tab. In the **Schema Structure** table expand the **interchanges** element, expand the **interchange** element, and then map fields to the **Relational Fields** area.

**Tip:** For details, see the "Hierarchy Parser Transformation" section of the *Data Integration Transformation Guide*.

## Step 5. Configure the targets

Create target transformations to specify your backend systems as the target objects. For each message type, create the relevant backend systems as targets.

**Note:** Do not parameterize the targets. Parameterizing the targets might result in errors at run time.

1. Add a target to the mapping canvas and connect the **Hierarchy Parser** transformation of the relevant message type to the target.  
If you selected multiple fields in the field mapping of the **Hierarchy Parser** transformation, the **Select Output Group** dialog box shows.
2. Select the group or groups to add to the target and then click **OK**.
3. In the **Properties** panel, on the **General** tab, you can enter a name and description.
4. Click the **Target** tab and configure target details.
5. Optionally, click the **Field Mapping** tab and map incoming fields to target fields.

## Creating a process-from-backend mapping for outbound EDI message flows

Create a process-from-backend mapping that processes outgoing EDI messages in Data Integration.

A mapping can process a single message type or multiple message types. When you create a partner, you can select a mapping that contains a single message type when you add the message type for the partner. You can select a mapping that includes multiple message types when you define the outbound flow for the partner. To use mappings that contain a single message type you must also create a message discovery mapping and assign it to the outbound flow of the partner. For more information, see [“Creating a message discovery mapping for outbound EDI message flows” on page 85](#).

When you create the mapping in Data Integration you select your backend system as the source. You add two source transformations to the mapping, a transformation for the master source and a transformation for the source that contains the message details. For example, add a source that contains the order as the master source and a details source that contains the order details.

If you define multiple interchange IDs of the same type for the partner that uses the mapping, define the interchange IDs to use in outbound flows in the source that contains the message details and map it to the interchange ID fields in the target transformations. You can map one interchange production ID and one interchange test ID. You must map at least one interchange ID in the mapping.

If information on multiple message types appears in the same table, you add a filter for each message type. You then add and configure a Hierarchy Builder transformation for each message type, and, for each message type, add the B2B Gateway interface file as the target.

After you add all the required elements to the mapping save and validate the mapping.

### Step 1. Create the mapping

Create the mapping for outbound flows in Data Integration.

1. Click **New > Mappings**, and then click **Create**.
2. In the mapping Properties panel, enter the mapping name and description, and change the location to save the mapping.

You can use alphanumeric characters and underscores (\_) in the mapping name.

## Step 2. Configure the source

Create Source transformations to specify your backend system as the source object. Create one source transformation for the master source and one source transformation for the source that contains the message details.

**Note:** Do not parameterize the sources. Parameterizing the sources might result in errors at run time .

1. Add a source for the master to the mapping canvas.
2. In the **Properties** panel, on the **General** tab, you can enter a name and description.
3. Click the **Source** tab and configure source details.
4. Repeat steps [1](#) through [3](#) to add a source transformation for the message details.

## Step 3. Create Filter transformations

If information on multiple message types appears in the same table, create Filter transformations to filter target data based on the message type. Create a transformation for each type of outbound message in the table.

1. Add a **Filter** transformation to the mapping canvas and connect the source to the **Filter** transformation.
2. Click the **Filter** tab. In the **Field Name** column select **MESSAGE\_TYPE** and then, in the **Value** column, enter the value of the message type for which you create the filter.
3. Repeat steps [1](#) through [2](#) for each message type in the table.

## Step 4. Create Hierarchy Builder transformations

Create Hierarchy Builder transformations to transform source relational database data to XML data. Create a transformation for each type of outbound message that you want to map.

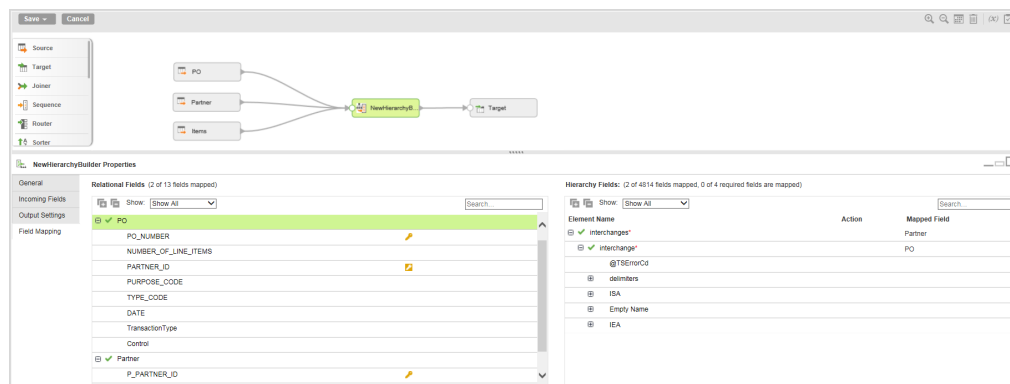
1. Add a **Hierarchy Builder** transformation to the mapping canvas and connect the last transformation that you created for the relevant message type to the **Hierarchy Builder** transformation, that is, the **Source**, **Filter**, or **Expression** transformation that you created for the message type for which you are adding the **Hierarchy Builder** transformation.
2. In the **Properties** panel select the **Output Settings** tab and then click **Select**.  
The **Select Schema** dialog box shows.
3. Select the schema of the message type to add to the outbound flow and then click **OK**.
4. Click the **Field Mapping** tab and, in the **Relational Fields** area, define the relationships between the tables. Assign the following keys to the source tables:
  - For each table, define the primary key.
  - For the table that contains the source details, define a foreign key that points to the master source table.
5. If your schema contains a single master table and a single source details table, the **Hierarchy Builder** transformation creates a file for each master table row. In this case, perform the following tasks to create all table rows into one hierarchy and add the hierarchy to the transformation:
  - a. Add a new source table to the transformation, and assign it a primary key.
  - b. In the master source table, for every table row, assign a foreign key that points to the primary key of the new source table.

- c. Map the new source table from the **Relational Fields** area to the following element in the **Hierarchy Fields** area:
    - EDI X12 messages: **interchanges** element.
    - EDIFACT messages: **interchange** element.
6. Configure field mappings for the master table:
  - a. Map the master table from the **Relational Fields** area to the following element in the **Hierarchy Fields** area:
    - EDI X12 master table: **Interchange** element.
    - EDIFACT master table: **Loop\_UNG** element.

**Tip:** See **PO** in the sample field mappings below.
  - b. Map the EDI data fields of the table from the **Relational Fields** area to the required EDI segments in the **Hierarchy Fields** area.
7. Configure field mappings for the details table:
  - a. Map the table from the **Relational Fields** area to the relevant loop in the **Hierarchy Fields** table.
  - b. Map the EDI data fields of the table from the **Relational Fields** area to the required EDI segments in the **Hierarchy Fields** area.

**Tip:** For details, see the "Hierarchy Builder Transformation" section of the *Data Integration Transformation Guide*.

The following image shows sample field mappings for EDI X12 messages:



8. Repeat steps [1](#) through [7](#) for each message type.

## Step 5. Configure the target

Create target transformations to specify the B2B Gateway interface file as the target object. Create a target transformation for each type of message that you want to map.

1. Add a target to the mapping canvas and connect the relevant **Hierarchy Builder** transformation to the target.
2. In the **Properties** panel, on the **General** tab, you can enter a name and description.

- Click the **Target** tab and then select the following options:

Option	Selection
Connection	B2B EDI Gateway
Target Type	Single Object
Object	GW_TARGET
Operation	Insert

- Click **New Parameter** to the right of the **Connection** field.  
The **New Input Parameter** dialog box shows.
- Enter a parameter name and then click **OK**.  
The **New Input Parameter** dialog box closes. In the **Properties** panel, the parameter name you entered shows in the **Connection** field.  
**Note:** You must parameterize the B2B EDI Gateway connection.
- Click the **Field Mapping** tab. In the **Field mapping options** field, verify that the **Manual** option is selected, and then map the **Output** field in the **Incoming Fields** table to the **DATA** field in the **Target Fields** table.
- If you define multiple interchange IDs of the same type for the partner that uses the mapping, map the incoming fields that contain the IDs to use for the partner to one or both of the following target fields, as applicable:
  - PARTNER\_PROD\_INTERCHANGE\_ID
  - PARTNER\_TEST\_INTERCHANGE\_ID
- Optionally, map additional target fields. For more information, see [“Target fields in custom mappings” on page 79](#).
- Repeat steps [1](#) through [8](#) for each message type.

## Creating a message discovery mapping for outbound EDI message flows

Create a message discovery mapping that discovers messages that are ready to be sent to customers, based on the message type. Assign the message discovery mapping to partners to which you assign one or more process-from-backend mappings that contain a single message type.

When you create the mapping you select the B2B Gateway connection as the source, and the B2B Gateway XML interface file as the target, and map all the message types that you want the mapping to discover as the target fields.

After you add all the required elements to the mapping save and validate the mapping.

### Step 1. Create the mapping

Create the mapping for outbound flows in Data Integration.

- Click **New > Mappings**, and then click **Create**.
- In the mapping Properties panel, enter the mapping name and description, and change the location to save the mapping.

You can use alphanumeric characters and underscores (\_) in the mapping name.

## Step 2. Configure the source

Create Source transformations to specify your backend system as the source object. Create one source transformation for the master source and one source transformation for the source that contains the message details.

**Note:** Do not parameterize the sources. Parameterizing the sources might result in errors at run time .

1. Add a source for the master to the mapping canvas.
2. In the **Properties** panel, on the **General** tab, you can enter a name and description.
3. Click the **Source** tab and configure source details.
4. Repeat steps [1](#) through [3](#) to add a source transformation for the message details.

## Step 3. Configure the target

Create a target transformation to specify the B2B Gateway interface file as the target object.

1. Add a target to the mapping canvas and connect the source to the target.
2. In the **Properties** panel, on the **General** tab, you can enter a name and description.
3. Click the **Target** tab and then select the following options:

Option	Selection
Connection	B2B EDI Gateway
Target Type	Single Object
Object	MSG_DISCOVERY
Operation	Insert

4. Click **New Parameter** to the right of the **Connection** field.  
The **New Input Parameter** dialog box shows.
5. Enter a parameter name and then click **OK**.  
The **New Input Parameter** dialog box closes. In the **Properties** panel, the parameter name you entered shows in the **Connection** field.  
**Note:** You must parameterize the B2B EDI Gateway connection.
6. Click the **Field Mapping** tab. In the **Field mapping options** field, verify that the **Manual** option is selected, and then map an **Output** field in the **Incoming Fields** table to the **MSG\_TYPE** field in the **Target Fields** table. Map all the **Output** fields to the **Target Fields** table, each **MSG\_TYPE** field in a separate row.

## CHAPTER 5

# Custom files with custom mappings

B2B Gateway uses custom Data Integration mappings, which you create, to validate and handle custom file exchanges between the organization and its partners.

### **Custom mappings for inbound custom files**

Use an inbound mapping to receive files from partners. If you use the two-step processing method, the inbound mapping writes the files to an interface file on the B2B Gateway document store. If you use the single-step method, the inbound mapping writes the data to the backend system. The source of the inbound mapping is the incoming files, and the target is either an interface file on the B2B Gateway document store or the backend system, based on the method that you use.

If the target of the mapping is B2B Gateway, you can use a process-to-backend mapping to read the files from the gateway and write the data to the backend system. The source of the process-to-backend mapping is the interface file on B2B Gateway, and the target is the backend system.

For inbound Excel, TXT, and CSV files, instead of creating custom mappings to process the incoming files, you can use Informatica Intelligent Structure Discovery to automatically discover the file structure and create CSV interface files. You can then create custom mappings that process the data to your backend system.

For more information about the processing methods, see [“Inbound process for custom files” on page 25](#).

### **Custom mappings for outbound custom files**

Use a process-from-backend mapping to read outgoing data from the backend system and write the data to an interface file on the B2B Gateway document store.

You can use an additional, outbound mapping to read the data from the gateway and send it to the partner. The source of the outbound mapping is the interface file on B2B Gateway, and the target is the target location for the partner that you send the data to.

# Interface files for custom files

When you exchange custom files with your partners, you can use any type of file as the interface file for custom mappings.

## Data Integration mappings for custom files with custom mappings

B2B Gateway uses custom mappings to handle inbound and outbound custom files based on the flows that you assign to the partner.

When you define an inbound flow you must use a custom mapping to receive partner files. The inbound mapping can write the data either to an interface file on the B2B Gateway document store or to the backend system. If the inbound mapping writes the data to the document store, you can use an additional custom mapping to write the data to the backend system.

For inbound Excel, TXT, and CSV files, instead of creating custom mappings to process the incoming files, you can use Informatica Intelligent Structure Discovery to automatically discover the file structure and create CSV interface files. You can then create custom mappings that process the data to your backend system.

When you define an outbound flow you must use a custom mapping to read the data to send to the partner from the backend system. The mapping writes the data to an interface file on the B2B Gateway document store. You can use an additional, outbound custom mapping to send the data to the partner.

## Rules and guidelines for custom file mappings

When you develop custom Data Integration mappings to use in B2B Gateway for custom, non-EDI file exchange, consider these rules and guidelines.

- The mappings can process any type of file. B2B Gateway does not verify the file type when it runs the mapping.
- You can create the mappings after your organization is set up in Data Integration and B2B Gateway connections are available for selection when you create the mapping.

**Warning:** When you set up the organization in B2B Gateway, B2B Gateway creates the connections **B2B EDI Gateway**, **B2B EDI Gateway Endpoint**, and **B2B Gateway Document Store** in the Informatica Intelligent Cloud Services organization. Do not rename or edit these connections. Editing a connection or changing a connection name might result in errors at run time.

- You must parameterize connections to a B2B Gateway connection. Do not parameterize any other connections.

**Note:** Parameterizing connections other than B2B Gateway connections might result in errors at run time.

- When the target of a mapping is GW\_ROUTER, the value that you assign to the STATUS\_MESSAGE port appears in Error events. For all other event statuses, the gateway does not show the status message in the event. Therefore, assign a value to STATUS\_MESSAGE only in case IS\_ERORR is true.



## Context parameters in custom mappings

You can use input and in-out parameters as context parameters in custom mappings to add information from the gateway to inbound and outbound messages and to filter the data in inbound and outbound messages. For example, add the partner name to inbound messages, or filter outbound messages based on partner number.

Consider the following guidelines when you add the parameters:

- Add a transformation to the mapping. You can add any transformation that accepts Data Integration parameters as input. For example, an Expression transformation or a Filter transformation.
- In outbound flows, add the transformation before the target. In inbound flows, add the transformation after the source.
- Configure ports that add the data. The following table describes the port values that you can configure. Port values are not case sensitive.

Port Value	Data to Add to the Port
PARTNER_NUMBER	Partner number
PARTNER_NAME	Partner name
PARTNER_PROD_INTERCHANGE_ID	Partner production interchange ID
PARTNER_TEST_INTERCHANGE_ID	Partner test interchange ID
EVENT_ID	Event ID

## Mapping sources and targets in custom file mappings

The sources and targets in custom mappings depend on the direction of the flow, inbound or outbound. For inbound flows, the target of the mapping depends on the processing method, two-step processing or single-step processing.

### Sources and targets in inbound flows

Mapping sources and targets in inbound flows depend on the processing method, two-step processing or single-step processing.

#### Two-step processing

In two-step processing you use both an inbound mapping and a process-to-backend mapping.

The following table describes the sources and targets of the inbound mapping in two-step processing:

Mapping component	Requirements
Source Connection	B2B EDI Gateway Endpoint
Source Object	get

Mapping component	Requirements
Target Connection	B2B EDI Gateway
Target Object	CUSTOM_TARGET

The following table describes the sources and targets of the process-to-backend mapping in two-step processing:

Mapping component	Requirements
Source Connection	<p>You can add multiple source connections to the mapping. You can use the following connections in the mapping:</p> <ul style="list-style-type: none"> <li>- B2B EDI Gateway. You must parameterize the connection.</li> <li>- Optional connections to other connectors. You can use any Informatica connection that isn't a B2B Gateway connection. Do not parameterize the connections.</li> </ul> <p><b>Note:</b> Connecting additional sources to a B2B Gateway connection or parameterizing them might result in errors at run time.</p>
Source Object	CUSTOM_SOURCE
Target Connection	Any
Target Object	Any

### Single-step processing

In single-step processing you use an inbound mapping. The following table describes the sources and targets of the inbound mapping in single-step processing:

Mapping component	Requirements
Source Connection	B2B EDI Gateway Endpoint
Source Object	get
Target Connection	Any
Target Object	Any

## Sources and targets in outbound flows

Mapping sources and targets in outbound flows depend on the stage of the process that the mapping performs, process the data from the backend to B2B Gateway or process the data from B2B Gateway to the partner.

The following table describes the sources and targets of the process-from-backend mapping:

Mapping component	Requirements
Source Connection	Any
Source Object	Any
Target Connection	B2B EDI Gateway
Target Object	CUSTOM_TARGET

The following table describes the sources and targets of the outbound mapping:

Mapping component	Requirements
Source Connection	B2B EDI Gateway
Source Object	CUSTOM_SOURCE
Target Connection	B2B EDI Gateway Endpoint, B2B EDI Gateway
Target Object	put, CUSTOM_TARGET

## CHAPTER 6

# Inbound Custom Files with Intelligent Structure Discovery

You can use Intelligent Structure Discovery to receive incoming Excel, TXT, and CSV files from customers. Intelligent Structure Discovery writes the files to an interface file on the B2B Gateway document store.

In addition, use custom Data Integration mappings, which you create, to handle the following stages of the file exchanges between the organization and its partners:

### **Custom mappings for inbound custom files with Intelligent Structure Discovery**

You can use a process-to-backend mapping to read the files from the document store and write the data to the backend system. The source of the process-to-backend mapping is the interface file on B2B Gateway, and the target is the backend system.

### **Custom mappings for outbound custom files**

Use a process-from-backend mapping to read outgoing data from the backend system and write the data to an interface file on the B2B Gateway document store.

You can use an additional, outbound mapping to read the data from the gateway and send it to the partner. The source of the outbound mapping is the interface file on B2B Gateway, and the target is the target location for the partner that you send the data to.

## Interface files for custom files with Intelligent Structure Discovery

For inbound CSV, TXT, and Excel files that use Intelligent Structure Discovery, Intelligent Structure Discovery creates CSV interface files between the custom mappings and the file structures.

## Intelligent Structure Discovery message structures

EDI and EDIFACT files contain information that is structured according to the EDI or EDIFACT standard. Non-EDI files, such as Excel files, contain information that is structured according to the needs of the user. For

example, an Excel file might contain tables with inventory information. The structure of the information gives meaning to the inventory data that is presented in the columns and rows.

Intelligent Structure Discovery uses artificial intelligence and machine learning algorithms to automate structure discovery for such files by evaluating the type of data that is presented. When Intelligent Structure Discovery runs, it creates and displays a message structure that contains the elements that were identified in the discovery process.

For more information about managing intelligent structures, see *Intelligent structures* in the Data Integration service help.

## Creating a structure

Create a message structure for B2B Gateway in Data Integration.

1. In Data Integration, click **New > Components > Intelligent Structure Model**.  
The New Structure wizard appears.
2. In the **General** page, enter a name and description. You must provide a name for the message structure.
3. To create a message structure, browse for a file and click **Discover Structure**.
4. To refine the message structure, you can select an element and combine, exclude, flatten, or collapse the element.
5. To save the message structure, click **Save**.

# Data Integration mappings for custom files with Intelligent Structure Discovery

When you use Intelligent Structure Discovery to receive incoming Excel, TXT, and CSV files from customers, Intelligent Structure Discovery writes the files to interface files on the B2B Gateway document store. You can use a process-to-backend Data Integration custom mapping to read the interface files from the document store and write the data to the backend system.

When you define an outbound flow you must use a custom mapping to read the data to send to the partner from the backend system. The mapping writes the data to an interface file on the B2B Gateway document store. You can use an additional, outbound custom mapping to send the data to the partner. For more information, see [“Rules and guidelines for custom file mappings” on page 88](#).

## Creating a custom mapping for inbound custom files with Intelligent Structure Discovery

Create a mapping that processes all incoming files for a message structure from the B2B Gateway document store to the backend system.

You can create as many mappings as required, one mapping for each message structure for which you want to process the interface files to the backend system.

When you create the mapping you select the B2B Gateway document store as the source, select the fields that you want to use in the mapping, and define the sample interface files of the structure as source parameters. You configure the organization backend system as the mapping target and map fields. You can add other elements to the mapping, based on your business logic, for example, filters and joiners.

To define the B2B Gateway document store as a source, you select a flat file connection that accesses the interface files. You must parameterize the connection. You can add as many connections to interface files as required.

Optionally, you can add more sources to the mapping. You can use any Informatica connection that isn't a B2B Gateway connection. Do not parameterize the connections.

**Note:** Parameterizing connections other than B2B Gateway connections might result in errors at run time.

After you add all the required elements to the mapping save and validate the mapping.

## Step 1. Create the mapping

Create the mapping for inbound flows.

1. Click **New > Mappings**, and then click **Create**.
2. In the mapping Properties panel, enter the mapping name and description, and change the location to save the mapping.

You can use alphanumeric characters and underscores (\_) in the mapping name.

## Step 2. Configure the sources

Create source transformations to specify the sample interface files on the B2B Gateway connection as the source objects.

Optionally, add other sources to the mapping.

1. Add a source to the mapping canvas.
2. Click the **Source** tab and then select the following options:

Option	Selection
Connection	Flat file connection that accesses the interface files.
Source Type	Single Object
Object	A sample interface file.

**Note:** You must parameterize the flat file connection that accesses the interface files.

3. Repeat steps [1](#) and [2](#) for all the sample interface files.
4. Optionally, add more Source transformations to the mapping and configure them. You can use any Informatica connection that isn't a B2B Gateway connection. Do not parameterize the connections.

**Note:** Connecting additional sources to a B2B Gateway connection or parameterizing them might result in errors at run time.

## Step 3. Select incoming fields

For each sample interface file, select the incoming fields to use in the mapping.

1. Add an object to the mapping canvas and connect one of the source transformations you created to the object you add. You can add any type of object, based on the business logic that you want to add to the mapping. For example, a filter or a joiner. The object can also be the target of the mapping.

2. Select the object you added. Select the **Incoming Fields** tab and, in the **Field Rules** table, select the following options:

Option	Selection
Operator	Include
Field Selection Criteria	Named Fields

Click anywhere outside of the **Field Selection Criteria** selection box.

3. In the **Field Rules** table, under **Details**, click **Configure**.  
The **Include Named Fields** dialog box appears, listing all the fields in the sample interface file.
4. Select the incoming fields to use in the mapping and then click **OK**.  
The **Include Named Fields** dialog box closes.
5. If required, add more elements to the mappings to build the business logic of the mapping.  
**Note:** If you selected incoming fields in a target transformation, do not add elements after the target. The target must be the last element in the mapping.
6. Repeat steps [1](#) through [5](#) for all the sample interface files that you defined as sources in the mapping.

## Step 4. Configure the targets

Create target transformations to specify your backend systems as the target objects for the interface files. Each sample interface file that you defined as a source in the mapping must be mapped to a target.

**Note:** If you added target transformations when you selected incoming fields, you do not need to add more target transformations.

1. Add a target to the mapping canvas and connect the last element on the mapping to the target, or, if you already added a target to the mapping, select the existing target.
2. Click the **Target** tab and configure target details.
3. Click the **Field Mapping** tab and map incoming fields to target fields.

## Step 5. Parameterize the sources

Parameterize the sources. Name each source parameter by the name of the sample interface file that is the source object.

1. Click the **Source** tab, select a source element, and then select the following options:

Option	Selection
Connection	B2B Gateway Document Store
Source Type	Parameter

2. Click **New Parameter**.  
The **New Input Parameter** dialog box appears.
3. In the **Name** field, enter the name of an output group in the structure. Click **OK**.
4. Repeat steps [1](#) through [3](#) for all the sources in the mapping.

## CHAPTER 7

# File transfer tasks

File transfer tasks run actions on files that B2B Gateway receives from file servers or sends to file servers.

You can use file transfer tasks with partner flows that use a file servers connection type. Use the tasks to decrypt or decompress inbound files and to encrypt or compress outbound files. You select a task for a flow when you configure the partner.

## Encrypt

An encrypt file transfer task uses PGP to encrypt outbound files when transferring them from the source location to the home directory of the file server user.

You can use encrypt tasks in outbound partner flows.

An encrypt task contains the following variables:

Variable	Description
PUBLIC_KEY_ID	ID of the key to use to encrypt the file.
SECRET_KEY_ID	Required when the value of SIGN is true. The ID of the secret key to use to sign the file.
SECRET_KEY_PASSPHRASE	Required when the value of SIGN is true. The passphrase to access the secret key.
SIGN	Determines whether the files must be signed by PGP. Valid values are true or false. Default is false. Values are not case sensitive.

## Decrypt

A decrypt file transfer task uses PGP to decrypt uploaded files when transferring them from the directory of the user on the file server to the B2B Gateway document store.

You can use decrypt tasks in inbound partner flows.



A decrypt task contains the following variables:

Variable	Description
PATTERN_CASE_SENSITIVE	Determines whether the file pattern is case sensitive. Valid values are true or false. Default is false. Values are not case sensitive.
PATTERN_TO_COLLECT	File name pattern of the files to collect and decrypt. Use a regular expression to match the file name pattern.
PGP_PASSPHRASE	PGP passphrase.

## Compress

A compress file transfer task compresses outbound files when transferring them from the source location to the home directory of the file server user.

You can use compress tasks in outbound partner flows.

A compress task contains the following variable:

Variable	Description
COMPRESSION_TYPE	Type of compression. Valid values are Zip, Tar, or Gzip. Default is Zip. Values are not case sensitive.

## Decompress

A decompress file transfer task decompresses uploaded files when transferring them from the directory of the user on the file server to the B2B Gateway document store.

You can use decompress tasks in inbound partner flows.

A decompress task contains the following variables:

Variable	Description
DECOMPRESSION_TYPE	Type of decompression. Valid values are UnZip, UnTar, or GunZip. Default is UnZip. Values are not case sensitive.
PATTERN_CASE_SENSITIVE	Determines whether the file pattern is case sensitive. Valid values are true or false. Default is false. Values are not case sensitive.
PATTERN_TO_COLLECT	File name pattern of the files to collect and decompress. Use a regular expression to match the file name pattern.

## CHAPTER 8

# Partners

Create partners for exchanging messages. A partner can be either a customer or a supplier. You create a customer in the **New Customer** wizard. You create a supplier in the **New Supplier** wizard.

You can create partners for the following types of messages:

- X12 and EDIFACT messages
- Custom messages
- Custom messages with Intelligent Structure Discovery

When you create a partner, you can define an inbound flow, an outbound flow, or both. The properties that you configure for the partner depend on the type of messages that you exchange with the partner and on the type of connections you use for the exchange.

## Create partners for EDI and EDIFACT messages

Create partners for exchanging EDI and EDIFACT messages.

When you create a partner for EDI and EDIFACT messages, you configure general partner properties, select the types of messages to exchange with the partner, and define an inbound flow, an outbound flow, or both.

Before you create a partner, verify that you have completed the required prerequisites.

### Before you begin

Before you create a partner for EDI and EDIFACT messages, complete the following prerequisites:

- For an inbound flow, if you plan to use process-to-backend custom mappings for the partner, you must create the mappings.
- For an outbound flow, you must create one or more process-from-backend custom mappings.
- If you plan to use an Advanced FTP V2, Advanced FTPS V2, Advanced SFTP V2, or AS2 Client connection, configure the connection in Administrator. For information about configuring the connection, see the respective connector guide.
- If you plan to use the File Servers connection, create a user account for each partner that sends files from an AS2, HTTPS, or SFTP server to your organization or receives files that you send to an HTTPS or SFTP server for the partner. For more information, see [“File server users” on page 38](#).
- If you plan to run a flow based on a schedule, verify that the schedule has been created or create the schedule in Administrator.

- Verify that you have the appropriate asset privileges to create the partner and define the flows. For more information about privileges, see [“User roles” on page 37](#).

## Creating a partner for EDI and EDIFACT messages

Create a customer in the **New Customer** wizard, or create a supplier in the **New Supplier** wizard.

1. Click **New** and select **Partners > Customer** or **Partners > Supplier**, as applicable.  
The **New Customer** or **New Supplier** wizard appears.
2. In the **General** page enter the partner name and number, select **EDI X12** or **EDIFACT** from the **File Type** list, and then enter the message interchange details. Click **Next**.  
The **Messages** page appears.
3. Perform the following steps:
  - a. Click **Add Message** to select a message type to exchange with the partner.
  - b. If required, edit the version, mode, or status of the message type.
  - c. For each message type, you can assign a custom process to process EDI messages of that type. To assign a custom process to a message type, perform the following tasks:
    1. Customize a Library Data Transformation project in Informatica Developer.
    2. Export or deploy the transformation as a service. For more information, see the *Data Transformation User Guide*.
    3. Upload the custom transformation service to B2B Gateway. For more information, see [“Creating a custom B2B Gateway transformation service” on page 41](#).
    4. In the **Custom Process** field, select a transformation service from the list.
  - d. For each message type, you can attach a process-from-backend mapping. To attach a process-from-backend mapping to the message type, click the Actions button to the right of the line of the message type, click **Add Process-from-Backend Mapping**, select a mapping that is appropriate to the message type that you are adding, and then click **Select**.  
**Note:** For both inbound and outbound flows, define each message type in one mapping only. If you define the same message type in both a message-specific backend processing mapping and in the flow's backend processing mapping, B2B Gateway might run messages of that message type twice. For example, if you define a process-from-backend mapping for the *810 Invoice* message type for a customer, and *810 Invoice* is also defined in the process-from-backend mapping that is defined for the outbound flow of the customer, B2B Gateway might run *810 Invoice* messages twice.
  - e. Add as many message types as applicable for the partner.
  - f. Click **Next**.  
The **Inbound** page appears.
4. To define an inbound flow, perform the following steps:
  - a. Select the connection type for the flow and configure connection details.
  - b. If you selected the **Advanced FTP V2**, **Advanced FTPS V2**, or **Advanced SFTP V2** connection type, select the connection where B2B Gateway creates files for the partner and the action that B2B Gateway performs on the files after pickup.

- c. If you selected the **File Servers** connection type, you can select a file transfer task in the **Pre-Process** area and define the task variables. You can select one of the following file transfer tasks:

Name	Description
Decrypt	Decrypts files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decrypt" on page 96</a> .
Decompress	Decompresses files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decompress" on page 97</a> .

- d. If you selected the **Local Folder/MFT, FTP Client, or SFTP Client** connection type, select whether or not B2B Gateway deletes files after pickup.
- e. Select a process-to-backend mapping if applicable and the location where B2B Gateway saves the mapping. This mapping is used for messages where a process-to-backend mapping is not associated with the message type.
- f. If the mapping contains parameters, optionally enter parameter values in the **Mapping Parameters** list.
- g. For EDI X12 messages, select whether to use element names or element reference numbers in the B2B Gateway XML interface files.
- h. Define a schedule for the flow.
- i. Click **Next**.

The **Outbound** page appears.

**Tip:** If the outbound flow uses the same connection as the inbound flow, and the connection type is File Servers, Local Folder/MFT, FTP Client, or SFTP Client, click **Copy Details from Inbound** to populate the **Outbound** page with details that you entered in the **Inbound** page and then edit the outbound details, as required.

5. To define an outbound flow, perform the following steps:
- a. Select the connection type for the flow and configure connection details.
- b. If you selected the **Advanced FTP V2, Advanced FTPS V2, Advanced SFTP V2, or AS2 Client** connection type, select the connection where B2B Gateway creates files for the partner.
- c. If you selected the **File Servers** connection type, you can select a file transfer task in the **Post-Process** area and define the task variables. You can select one of the following file transfer tasks:

Name	Description
Encrypt	Encrypts files that you send to the partner before they are upload to the file server. For more information, see <a href="#">"Encrypt" on page 96</a> .
Compress	Compresses files that you send to the partner before they are upload to the file server. For more information, see <a href="#">"Compress" on page 97</a> .

- d. Select one or both of the following mappings, and the locations where B2B Gateway saves the mappings:
  - If you assigned process-from-backend mapping to specific messages on the **Messages** page, select a message discovery mapping.
  - Select a process-from-backend mapping to use for messages where a process-from-backend mapping is not associated with the message type.
- e. If the mappings contain parameters, optionally enter parameter values on the **Mapping Parameters** lists.
- f. Optionally configure message details.
- g. Optionally define a schedule for the flow.
- h. Click **Save**.

The partner shows on the **Explore** page.

## Partner properties for EDI X12 and EDIFACT messages

Use the partner wizard to create or edit a partner. A partner can be either a customer or a supplier.

The partner wizard contains the following pages for EDI X12 and EDIFACT messages:

### General page

Define partner details and message interchange details.

### Messages page

Select the types of messages that you exchange with the partner and define general message details. For each message type that you select you can assign a custom process to process EDI messages of that type, and select process-to-backend and process-from-backend mappings for the message type, as applicable.

### Inbound page

Define the connection to use for the inbound flow, select a file transfer task if applicable, select a custom process-to-backend mapping if applicable, and define the schedule by which the flow runs.

### Outbound page

Define the connection to use for the outbound flow, select a file transfer task if applicable, select a message discovery mapping, a process-from-backend mapping, or both, configure message details, and define a schedule to run the flow.

## Partner general properties for EDI and EDIFACT messages

Use the **General** page of the partner wizard to define partner details and message interchange details.

The **General** page includes the following properties for EDI and EDIFACT messages:

### Customer or Supplier Details

#### Customer or Supplier Name

Name of the partner. The name can contain up to 30 characters and must be unique in the organization and can be used either for a customer or for a supplier, not for both. The name can contain alphanumeric characters, symbols, and special characters, and must not contain angled brackets (< or >).

### Customer or Supplier Number

Number of the partner. The number can contain up to 15 characters and must be unique in the organization. The number can contain alphanumeric characters, symbols, and special characters, and must not contain angled brackets (< or >).

**Tip:** Use a number that identifies the partner in your organization.

### File Type

Type of files to exchange with the partner. Select **EDI X12** or **EDIFACT**.

## Message Interchange Details

### Customer or Supplier Interchange Qualifier

Partner interchange qualifier. Optional.

### Customer or Supplier Interchange Production ID

Interchange identifier to use for messages of message types that are in production mode, as defined in the **Messages** tab. The identifier can contain up to 15 ASCII characters for X12 message and up to 30 characters for EDIFACT message.

To define multiple interchange production IDs for the partner, click **Manage Multiple IDs**, add the IDs, and click **OK**. You can define up to 50 interchange production IDs.

### Customer or Supplier Interchange Test ID

Interchange identifier to use for messages of message types that are in test mode, as defined in the **Messages** tab. The identifier can contain up to 15 ASCII characters for X12 message and up to 30 characters for EDIFACT message.

To define multiple interchange test IDs for the partner, click **Manage Multiple IDs**, add the IDs, and click **OK**. You can define up to 50 interchange test IDs.

When you define interchange IDs for the partner, consider the following requirements:

- You must enter at least one partner Interchange ID. For more information, see [“Partner interchange IDs” on page 59](#).
- If you define multiple interchange IDs of the same type for the partner, you must pass the interchange ID to use in outbound flows as a parameter in the process-from-backend mapping that you assign to the partner. For more information, see [“Creating a process-from-backend mapping for outbound EDI message flows” on page 82](#).

### Customer or Supplier Group ID

Partner group identifier to use in outbound messages as the Application Receiver's Code, GS-03. Applies to X12 messages.

You can use the group identifier to differentiate between groups in your organization, so that the receiver of the messages can redirect the EDI data to the appropriate recipients. For example, assign each department in the organization a unique group identifier.

### Organization Interchange Qualifier

Organization interchange qualifier to use in outbound message to your partners. By default, the qualifier that is defined in the organization setup. If you want B2B Gateway to use a different qualifier in outbound messages for this partner, enter the qualifier here.

### Organization Interchange ID

Organization interchange identifier to use in outbound message to your partners. By default, the identifier that is defined in the organization setup. If you want B2B Gateway to use a different identifier in outbound messages for this partner, enter the identifier here.

## Partner messages properties for EDI and EDIFACT messages

Use the **Messages** page of the partner wizard to select the types of messages that you exchange with partners that you exchange EDI X12 and EDIFACT messages with and to define general message details.

**Note:** B2B Gateway rejects incoming messages of a type that is not selected or is disabled for the partner.

The **Messages** page can include the following properties for EDI and EDIFACT messages:

### Messages

To select the types of messages that you exchange with the partner, click **Add Message** and then select the message type to add, or select **Add all** to add all supported message types. The list of message types includes the supported EDI X12 or EDIFACT message types, based on the file type you select for the partner on the **General** page.

For each message type, select the version number that you use and select whether to use this type of message in test mode or in production mode. After you select a message type you can disable and enable the use of the message type in exchanges with the partner, as required.

For each message type, you can assign a custom process to process EDI messages of that type. To assign a custom process to a message type, perform the following tasks:

1. Customize a Library Data Transformation project in Informatica Developer.
2. Export or deploy the transformation as a service. For more information, see the *Data Transformation User Guide*.
3. Upload the custom transformation service to B2B Gateway. For more information, see [“Creating a custom B2B Gateway transformation service ” on page 41](#).
4. In the **Custom Process** field, select a transformation service from the list.

For each message type, you can attach a process-from-backend mapping. To attach a process-from-backend mapping to the message type, click the Actions button to the right of the line of the message type, click **Add Process-from-Backend Mapping**, select a mapping that is appropriate to the message type that you are adding, and then click **Select**.

### Security Information Qualifier

Applicable to the **EDI X12** file type. Select the code to identify the type of information in Security Information. If you select the option **01 Password**, enter the information in the **Security Information** field. Security information can contain up to 10 ASCII characters.

### Authorization Information Qualifier

Applicable to the **EDI X12** file type. Select the code to identify the type of information in Authorization Information. If you select an option other than **00 No Authorization Information Present**, enter the information in the **Authorization Information** field. Authorization information can contain up to 10 ASCII characters.

## Partner inbound properties for EDI and EDIFACT messages

Use the **Inbound** page of the partner wizard to define the inbound flow for the partner.

The **Inbound** page can include the following properties for EDI and EDIFACT messages:

### Connection

The **Connection** area includes the following properties:

### Connection Type

Select the type of the connection from where B2B Gateway picks up files. You can select the following connection types:

- Advanced FTP V2
- Advanced FTPS V2
- Advanced SFTP V2
- File Servers (AS2, HTTPS, SFTP)
- Local Folder/MFT
- FTP Client
- SFTP Client

### Connection

Connection where B2B Gateway creates files for the partner. Applies to the Advanced FTP V2, Advanced FTPS V2, and Advanced SFTP V2 connection types.

You configure connections in Administrator. For information about configuring the connections, see the respective connector guides.

### File Server User

The file server user name for the partner from whom you receive files. Applies to the file servers connection type.

You create file server users in Administrator. For information about creating file server users, see the Administrator help.

### Host

Host where the files that B2B Gateway picks up are located. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

### Port

Port where the files that B2B Gateway picks up are located. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

### Source Directory

Path to the directory on the connection from where B2B Gateway picks up files. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

### File Pattern

Pattern that defines the names of the files that B2B Gateway picks up. The pattern must be a Java regular expression.

For example:

To pick up all files enter `.*`

To pick up only files that start with `ab` enter `ab\S.*`

**Tip:** After you configure the connection click **Test Connection** to test and validate the connection.

### File Pattern

Select the file pattern type to pick up.



### After File Pickup

Action that B2B Gateway performs on the files after pickup. Applies to the Advanced FTP V2, Advanced FTPS V2, and Advanced SFTP V2 connection types.

Choose one of the following options:

- **Keep Files.** Keep the files in the source location.
- **Delete Files.** Delete the files from the source location.
- **Archive Files.** Moves the files from the source location. Enter the target location in **Archive Directory**.
- **Rename Files.** Rename the files in the source location. Enter a suffix to add to the original file name in **New File Name Suffix**.

### Delete files on source after pickup

Determines whether or not B2B Gateway deletes files after pickup. Selected by default. Applies to the Local Folder/MFT, FTP Client, and FTPS Client connection types.

### Pre-Process

Optionally, select a file transfer task to run actions on files that you receive from the partner. Applies to the file servers connection type.

You can select one of the following file transfer tasks:

Name	Description
Decrypt	Decrypts files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decrypt" on page 96</a> .
Decompress	Decompresses files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decompress" on page 97</a> .

### Processing

The **Processing** area includes the following properties:

- **Process-to-Backend Mapping.** Optionally, select a mapping to process files from B2B Gateway to the organization backend system. This mapping is used for messages where a process-to-backend mapping is not associated with the message type.
- **Mapping Location.** Location where B2B Gateway saves the mapping.
- **Mapping Parameters.** Lists the mapping parameters. You can enter parameter values in the **Value** fields.
- **XML Interface Files.** Determines whether to use element names or element reference numbers in the B2B Gateway XML interface files. Applies to EDI X12 messages.

### Send Functional Acknowledgment (997)/Send Acknowledgment

Select whether or not to send acknowledgments to the partner. If you select to send acknowledgments, B2B Gateway generates and sends acknowledgments to the partner upon receiving and processing messages. Selected by default.

### Schedule

Schedule by which to run the flow. Select one of the following options:

- Manually or by an external trigger. No schedule. You can run the flow from the **Explore** page or from a REST API. You can also run the flow from the Partner wizard.

- By schedule. Runs the flow according to the defined schedule. Select a schedule from the list.  
**Note:** To run a flow by a schedule, users need Read and Run permissions for schedules. If permissions are not configured, users cannot see existing schedules. For more information about permissions, see [“User roles” on page 37](#).
- By file listener. Runs the flow according to the defined file listener rules. Select a file listener from the list. You create file listeners in Data Integration. For information about creating file listeners, see *Components* in the Data Integration help.

## Partner outbound properties for EDI X12 and EDIFACT messages

Use the **Outbound** page of the partner wizard to define the outbound flow for the partner.

The **Outbound** page can include the following properties for EDI X12 and EDIFACT messages:

### Copy Details from Inbound

Populates the fields in the **Outbound** page with the details that you entered in the **Inbound** page. You then edit the fields in the **Outbound** page as required. Applies to the File Servers, Local Folder/MFT, FTP Client, and SFTP Client connection types.

### Connection

The **Connection** area includes the following properties:

#### Connection Type

Select the type of the connection where B2B Gateway creates the files for the partner. You can select the following connection types:

- Advanced FTP V2
- Advanced FTPS V2
- Advanced SFTP V2
- AS2 Client
- File Servers (HTTPS, SFTP)
- Local Folder/MFT

#### Connection

Connection where B2B Gateway creates files for the partner. Applies to the Advanced FTP V2, Advanced FTPS V2, Advanced SFTP V2, and AS2 Client connection types.

You configure connections in Administrator. For information about configuring the connections, see the respective connector guides.

#### File Server User

The file server user name for the partner from whom you receive files. Applies to the File Servers connection type.

You create file server users in Administrator. For information about creating file server users, see the Administrator help.

#### Host

Host where B2B Gateway creates the files. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

**Port**

Port where B2B Gateway creates the files. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

**Target Directory**

Path to the directory on the connection where B2B Gateway creates the files.

**Pattern Type**

Select the file name pattern type to create.

**Pattern Type**

Select the file name pattern type to create.

**File Pattern**

Select the outbound acknowledgment file name pattern.

For example:

```
($eventId).edi
```

The patterns are not case sensitive. For more information about the file patterns that you can use in the outbound flow definition, see [“File Patterns” on page 32](#).

**Post-Process**

Applies to the file servers connection type. Optionally, select a file transfer task to run actions on files that you send to the partner. You can select one of the following file transfer tasks:

Name	Description
Encrypt	Encrypts files that you send to the partner before they are upload to the file server. For more information, see <a href="#">“Encrypt” on page 96</a> .
Compress	Compresses files that you send to the partner before they are upload to the file server. For more information, see <a href="#">“Compress” on page 97</a> .

**Processing**

The **Processing** area includes the following properties:

- **Message Discovery Mapping.** Use if you assigned a process-from-backend mapping to specific messages on the **Messages** page.
- **Process-from-Backend Mapping.** Use for messages where a process-from-backend mapping is not associated with the message type.
- **Mapping Location.** Location where B2B Gateway saves the mapping.
- **Mapping Parameters.** Lists the parameters of the process-from-backend mapping. You can enter parameter values in the **Value** fields.

**Tip:** If required, you can temporarily override the values that you define here by defining different values in the Run Partner REST API and running the flow with the API. For more information, see [“Run Partner REST API” on page 138](#).

**Message Details**

The **Message Details** area includes the following properties:

- **Data Element Separator.** Symbol used in the file as a data element separator.

- Repetition Separator. Symbol used in the file as a repetition separator.
- Component Element Separator. Symbol used in the file as a component element separator.
- Segment Terminator. Symbol used in the file as a segment terminator. Select **Add new line** to start a new line at the end of the segment.
- Decimal mark. Symbol used in the file as a decimal mark. Applies to the EDIFACT file type.
- Release Character. Symbol used in the file as a release character. Applies to the EDIFACT file type.
- Control Number. Determines the type of numbers to use as control numbers in outbound messages, including outgoing acknowledgments. You can choose one of the following options:
  - Use event ID. B2B Gateway adds file event IDs as control numbers to outbound messages and acknowledgments. Selected by default.
  - Use sequence numbers. B2B Gateway uses number sequences to determine the control numbers. The initial interchange control and group control numbers start the sequences. B2B Gateway adds the initial interchange control and group control numbers to the first outbound message or acknowledgement, and increments the numbers sequentially for subsequent messages. To reset the sequence of a control number, click **Edit Initial Number** next to the number to reset, enter the new initial number, and click **OK**. Control numbers can include only numeric characters. The allowed number of digits in control numbers is nine digits for EDI X12 messages and 14 digits for EDIFACT messages.

For more information about control numbers, see [“Control numbers in outbound messages” on page 59](#).

- Request technical acknowledgment (TA1). Determines whether or not you receive a technical acknowledgment for the file you send. Selected by default. Applies to the EDI X12 file type.
- Request functional acknowledgment (997). Determines whether or not you receive a functional acknowledgment for a functional group in the file you send. Selected by default. Applies to the EDI X12 file type.
- Add UNG group header. Determines whether or not message type events show the functional groups that are sent in the file. By default, not selected. Applies to the EDIFACT file type.
- Request acknowledgment. Determines whether or not you receive an acknowledgment when you send the file. Selected by default. Applies to the EDIFACT file type.

**Note:** Separators and terminators must be unique. You cannot assign the same symbol to more than one separator or terminator.

## Schedule

Schedule by which to run the flow. Select one of the following options:

- Manually or by an external trigger. No schedule. You can run the flow from the **Explore** page or from a REST API. You can also run the flow from the Partner wizard.
- By schedule. Runs the flow according to the defined schedule. Select a schedule from the list.

**Note:** To run a flow by a schedule, users need Read and Run permissions for schedules. If permissions are not configured, users cannot see existing schedules. For more information about permissions, see [“User roles” on page 37](#).

- By file listener. Runs the flow according to the defined file listener rules. Select a file listener from the list. You create file listeners in Data Integration. For information about creating file listeners, see *Components* in the Data Integration help.

# Create partners for custom files with custom mappings

Create partners for exchanging custom files with custom mappings.

When you create a partner for custom files with custom mappings, you configure general partner properties and define an inbound flow, an outbound flow, or both.

Before you create a partner, verify that you have completed the required prerequisites.

## Before you begin

Before you create a partner for custom files with custom mappings, complete the following prerequisites:

- For an inbound flow, you must create the inbound mapping. If you plan to use a process-to-backend mapping for the flow, you must also create the process-to-backend mapping.
- For an outbound flow, you must create a process-from-backend mapping. If you plan to use an outbound mapping for the flow, you must also create the outbound mapping.
- If you plan to use an Advanced FTP V2, Advanced FTPS V2, Advanced SFTP V2, or AS2 Client connection, configure the connection in Administrator. For information about configuring the connection, see the respective connector guide.
- If you plan to use the File Servers connection, create a user account for each partner that sends files from an AS2, HTTPS, or SFTP server to your organization or receives files that you send to an HTTPS or SFTP server for the partner. For more information, see [“File server users” on page 38](#).
- If you plan to run a flow based on a schedule, verify that the schedule has been created or create the schedule in Administrator.
- Verify that you have the appropriate asset privileges to create the partner and define the flows. For more information about privileges, see [“User roles” on page 37](#).

## Creating a partner for custom files with custom mappings

Create a customer in the **New Customer** wizard, or create a supplier in the **New Supplier** wizard.

1. Click **New** and select **Partners > Customer** or **Partners > Supplier**, as applicable.  
The **New Customer** or **New Supplier** wizard appears.
2. In the **General** page enter the partner name and number and then, from the **File Type** list, select **Custom**. Clear the option **Use intelligent structure discovery** and then click **Next**.  
The **Inbound** page appears.
3. To define an inbound flow, perform the following steps:
  - a. Select the connection type for the flow and configure connection details.
  - b. If you selected the **Advanced FTP V2**, **Advanced FTPS V2**, or **Advanced SFTP V2** connection type, select the connection where B2B Gateway creates files for the partner and the action that B2B Gateway performs on the files after pickup.

- c. If you selected the **File Servers** connection type, you can select a file transfer task in the **Pre-Process** area and define the task variables. You can select one of the following file transfer tasks:

Name	Description
Decrypt	Decrypts files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decrypt" on page 96</a> .
Decompress	Decompresses files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decompress" on page 97</a> .

- d. Select an inbound mapping and the location where B2B Gateway saves the mapping.
- e. If applicable, select a process-to-backend mapping and the location where B2B Gateway saves the mapping.
- f. If the mappings contain parameters, optionally enter parameter values on the **Mapping Parameters** lists.
- g. Click **Next**.

The **Outbound** page appears.

**Tip:** If the outbound flow uses the same connection as the inbound flow, and the connection type is File Servers, Local Folder/MFT, FTP Client, or SFTP Client, click **Copy Details from Inbound** to populate the **Outbound** page with details that you entered in the **Inbound** page and then edit the outbound details, as required.

4. To define an outbound flow, perform the following steps:
- a. Select the connection type for the flow and configure connection details.
- b. If you selected the **Advanced FTP V2**, **Advanced FTPS V2**, **Advanced SFTP V2**, or **AS2 Client** connection type, select the connection where B2B Gateway creates files for the partner.
- c. If you selected the **File Servers** connection type, you can select a file transfer task in the **Post-Process** area and define the task variables. You can select one of the following file transfer tasks:

Name	Description
Encrypt	Encrypts files that you send to the partner before they are upload to the file server. For more information, see <a href="#">"Encrypt" on page 96</a> .
Compress	Compresses files that you send to the partner before they are upload to the file server. For more information, see <a href="#">"Compress" on page 97</a> .

- d. Select a process-from-backend mapping and the location where B2B Gateway saves the mapping.
- e. If applicable, select an outbound mapping and the location where B2B Gateway saves the mapping.
- f. If the mappings contain parameters, optionally enter parameter values on the **Mapping Parameters** lists.
- g. Define a schedule for the flow.
- h. Click **Save**.

The partner you created shows on the **Explore** page.

## Partner properties for custom files with custom mappings

Use the partner wizard to create or edit a partner. A partner can be either a customer or a supplier.

The partner wizard contains the following pages for custom files with custom mappings:

### General page

Define partner details and message interchange details.

### Inbound page

Define the connection to use for the inbound flow, select a file transfer task if applicable, select an inbound mapping, select a process-to-backend mapping if applicable, and define the schedule by which the flow runs.

### Outbound page

Define the connection to use for the outbound flow, select a file transfer task if applicable, select a process-from-backend mapping, select an outbound mapping if applicable, and define the schedule by which the flow runs.

## Partner general properties for custom files with custom mappings

Use the **General** page of the partner wizard to define basic partner properties.

The **General** page includes the following properties for custom files with custom mappings:

### Customer or Supplier Name

Name of the partner. The name can contain up to 30 characters and must be unique in the organization and can be used either for a customer or for a supplier, not for both. The name can contain alphanumeric characters, symbols, and special characters, and must not contain angled brackets (< or >).

### Customer or Supplier Number

Number of the partner. The number can contain up to 15 characters and must be unique in the organization. The number can contain alphanumeric characters, symbols, and special characters, and must not contain angled brackets (< or >).

**Tip:** Use a number that identifies the partner in your organization.

### File Type

Type of files to exchange with the partner. Select **Custom**.

### Use intelligent structure discovery

Clear this option.

## Partner inbound properties for custom files with custom mappings

Use the **Inbound** page of the partner wizard to define the inbound flow for the partner.

The **Inbound** page can include the following properties for custom files with custom mappings:

### Connection

The **Connection** area includes the following properties:

### Connection Type

Select the type of the connection from where B2B Gateway picks up files. You can select the following connection types:

- Advanced FTP V2
- Advanced FTPS V2
- Advanced SFTP V2
- File Servers (AS2, HTTPS, SFTP)
- Local Folder/MFT
- FTP Client
- SFTP Client

### Connection

Connection where B2B Gateway creates files for the partner. Applies to the Advanced FTP V2, Advanced FTPS V2, and Advanced SFTP V2 connection types.

You configure connections in Administrator. For information about configuring the connections, see the respective connector guides.

### File Server User

The file server user name for the partner from whom you receive files. Applies to the file servers connection type.

You create file server users in Administrator. For information about creating file server users, see the Administrator help.

### Host

Host where the files that B2B Gateway picks up are located. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

### Port

Port where the files that B2B Gateway picks up are located. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

### Source Directory

Path to the directory on the connection from where B2B Gateway picks up files. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

### File Pattern

Pattern that defines the names of the files that B2B Gateway picks up. The pattern must be a Java regular expression.

For example:

To pick up all files enter `.*`

To pick up only files that start with `ab` enter `ab\S.*`

**Tip:** After you configure the connection click **Test Connection** to test and validate the connection.

### File Pattern

Select the file pattern type to pick up.



### After File Pickup

Action that B2B Gateway performs on the files after pickup. Applies to the Advanced FTP V2, Advanced FTPS V2, and Advanced SFTP V2 connection types.

Choose one of the following options:

- **Keep Files.** Keep the files in the source location.
- **Delete Files.** Delete the files from the source location.
- **Archive Files.** Moves the files from the source location. Enter the target location in **Archive Directory**.
- **Rename Files.** Rename the files in the source location. Enter a suffix to add to the original file name in **New File Name Suffix**.

### Delete files on source after pickup

Determines whether or not B2B Gateway deletes files after pickup. Selected by default. Applies to the Local Folder/MFT, FTP Client, and FTPS Client connection types.

### Pre-Process

Optionally, select a file transfer task to run actions on files that you receive from the partner. Applies to the file servers connection type.

You can select one of the following file transfer tasks:

Name	Description
Decrypt	Decrypts files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decrypt" on page 96</a> .
Decompress	Decompresses files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decompress" on page 97</a> .

### Processing

The **Processing** area includes the following properties:

- **Inbound Mapping.** Select an inbound mapping to receive files from the customer.
- **Process-to-Backend Mapping.** If the target of the mapping is an interface file on the B2B Gateway document store, optionally, select a mapping to process files from B2B Gateway to the organization backend system. This mapping is used for messages where a process-to-backend mapping is not associated with the message type.
- **Mapping Location.** Location where B2B Gateway saves the mapping.
- **Mapping Parameters.** Lists the parameters of the process-to-backend mapping. You can enter parameter values in the **Value** fields.

### Schedule

Schedule by which to run the flow. Select one of the following options:

- Manually or by an external trigger. No schedule. You can run the flow from the **Explore** page or from a REST API. You can also run the flow from the Partner wizard.
- By schedule. Runs the flow according to the defined schedule. Select a schedule from the list.

**Note:** To run a flow by a schedule, users need Read and Run permissions for schedules. If permissions are not configured, users cannot see existing schedules. For more information about permissions, see ["User roles" on page 37](#).

- By file listener. Runs the flow according to the defined file listener rules. Select a file listener from the list. You create file listeners in Data Integration. For information about creating file listeners, see *Components* in the Data Integration help.

## Partner outbound properties for custom files with custom mappings

Use the **Outbound** page of the partner wizard to define the outbound flow for the partner.

The **Outbound** page can include the following properties for custom files with custom mappings:

### Copy Details from Inbound

Populates the fields in the **Outbound** page with the details that you entered in the **Inbound** page. You then edit the fields in the **Outbound** page as required. Applies to the File Servers, Local Folder/MFT, FTP Client, and SFTP Client connection types.

### Connection

The **Connection** area includes the following properties:

#### Connection Type

Select the type of the connection where B2B Gateway creates the files for the partner. You can select the following connection types:

- Advanced FTP V2
- Advanced FTPS V2
- Advanced SFTP V2
- AS2 Client
- File Servers (HTTPS, SFTP)
- Local Folder/MFT

#### Connection

Connection where B2B Gateway creates files for the partner. Applies to the Advanced FTP V2, Advanced FTPS V2, Advanced SFTP V2, and AS2 Client connection types.

You configure connections in Administrator. For information about configuring the connections, see the respective connector guides.

#### File Server User

The file server user name for the partner from whom you receive files. Applies to the File Servers connection type.

You create file server users in Administrator. For information about creating file server users, see the Administrator help.

#### Host

Host where B2B Gateway creates the files. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

#### Port

Port where B2B Gateway creates the files. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

#### Target Directory

Path to the directory on the connection where B2B Gateway creates the files.

### Pattern Type

Select the file name pattern type to create.

### Pattern Type

Select the file name pattern type to create.

### File Pattern

Select the outbound acknowledgment file name pattern.

For example:

```
($eventId).edi
```

The patterns are not case sensitive. For more information about the file patterns that you can use in the outbound flow definition, see [“File Patterns” on page 32](#).

### Post-Process

Applies to the file servers connection type. Optionally, select a file transfer task to run actions on files that you send to the partner. You can select one of the following file transfer tasks:

Name	Description
Encrypt	Encrypts files that you send to the partner before they are upload to the file server. For more information, see <a href="#">“Encrypt” on page 96</a> .
Compress	Compresses files that you send to the partner before they are upload to the file server. For more information, see <a href="#">“Compress” on page 97</a> .

### Processing

The **Processing** area includes the following properties:

- **Process-from-Backend Mapping.** Reads outgoing data from the backend system and writes it to the B2B Gateway document store.
- **Outbound Mapping.** Optional outbound mapping that reads the files from the gateway and sends them to the partner.
- **Mapping Location.** Location where B2B Gateway saves the mapping.
- **Mapping Parameters.** Lists the parameters of the process-from-backend mapping. You can enter parameter values in the **Value** fields.

**Tip:** If required, you can temporarily override the values that you define here by defining different values in the Run Partner REST API and running the flow with the API. For more information, see [“Run Partner REST API” on page 138](#).

### Schedule

Schedule by which to run the flow. Select one of the following options:

- Manually or by an external trigger. No schedule. You can run the flow from the **Explore** page or from a REST API. You can also run the flow from the Partner wizard.
- By schedule. Runs the flow according to the defined schedule. Select a schedule from the list.

**Note:** To run a flow by a schedule, users need Read and Run permissions for schedules. If permissions are not configured, users cannot see existing schedules. For more information about permissions, see [“User roles” on page 37](#).

- By file listener. Runs the flow according to the defined file listener rules. Select a file listener from the list. You create file listeners in Data Integration. For information about creating file listeners, see *Components* in the Data Integration help.

## Create partners for custom files with Intelligent Structure Discovery

Create partners for exchanging custom files Intelligent Structure Discovery.

When you create a partner for custom files Intelligent Structure Discovery, you configure general partner properties, select a message structure for a sample custom input file, and define an inbound flow, an outbound flow, or both.

Before you create a partner, verify that you have completed the required prerequisites.

### Before you begin

Before you create a partner for custom files with Intelligent Structure Discovery, complete the following prerequisites:

- For an inbound flow, you must create the structures of the files that you plan to exchange with the partner. For information about creating structures, see [“Creating a structure” on page 93](#). If you plan to use a process-to-backend mapping for the flow, you must also create the process-to-backend mapping.
- For an outbound flow, you must create a process-from-backend mapping. If you plan to use an outbound mapping for the flow, you must also create the outbound mapping.
- If you plan to use an Advanced FTP V2, Advanced FTPS V2, Advanced SFTP V2, or AS2 Client connection, configure the connection in Administrator. For information about configuring the connection, see the respective connector guide.
- If you plan to use the File Servers connection, create a user account for each partner that sends files from an AS2, HTTPS, or SFTP server to your organization or receives files that you send to an HTTPS or SFTP server for the partner. For more information, see [“File server users” on page 38](#).
- If you plan to run a flow based on a schedule, verify that the schedule has been created or create the schedule in Administrator.
- Verify that you have the appropriate asset privileges to create the partner and define the flows. For more information about privileges, see [“User roles” on page 37](#).

## Creating a partner for custom files with Intelligent Structure Discovery

Create a customer in the **New Customer** wizard, or create a supplier in the **New Supplier** wizard.

1. Click **New** and select **Partners > Customer** or **Partners > Supplier**, as applicable. The **New Customer** or **New Supplier** wizard appears.
2. In the **General** page enter the partner name and number and then, from the **File Type** list, select **Custom**. Verify that **Use intelligent structure discovery** is selected and then click **Next**. The **Messages** page appears.

3. Click **Select Structure** and choose a message structure. Click **Select**, and then click **Next**.

The **Inbound** page appears.

4. To define an inbound flow, perform the following steps:
  - a. Select the connection type for the flow and configure connection details.
  - b. If you selected the **Advanced FTP V2**, **Advanced FTPS V2**, or **Advanced SFTP V2** connection type, select the connection where B2B Gateway creates files for the partner and the action that B2B Gateway performs on the files after pickup.
  - c. If you selected the **File Servers** connection type, you can select a file transfer task in the **Pre-Process** area and define the task variables. You can select one of the following file transfer tasks:

Name	Description
Decrypt	Decrypts files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decrypt" on page 96</a> .
Decompress	Decompresses files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decompress" on page 97</a> .

- d. If applicable, select a process-to-backend mapping and the location where B2B Gateway saves the mapping.
  - e. If the mapping contains parameters, optionally enter parameter values in the **Mapping Parameters** list.
  - f. Define a schedule for the flow.
  - g. Click **Next**.

The **Outbound** page appears.

**Tip:** If the outbound flow uses the same connection as the inbound flow, and the connection type is File Servers, Local Folder/MFT, FTP Client, or SFTP Client, click **Copy Details from Inbound** to populate the **Outbound** page with details that you entered in the **Inbound** page and then edit the outbound details, as required.

5. To define an outbound flow, perform the following steps:
  - a. Select the connection type for the flow and configure connection details.
  - b. If you selected the **Advanced FTP V2**, **Advanced FTPS V2**, **Advanced SFTP V2**, or **AS2 Client** connection type, select the connection where B2B Gateway creates files for the partner.
  - c. If you selected the **File Servers** connection type, you can select a file transfer task in the **Post-Process** area and define the task variables. You can select one of the following file transfer tasks:

Name	Description
Encrypt	Encrypts files that you send to the partner before they are upload to the file server. For more information, see <a href="#">"Encrypt" on page 96</a> .
Compress	Compresses files that you send to the partner before they are upload to the file server. For more information, see <a href="#">"Compress" on page 97</a> .

- d. Select a process-from-backend mapping and the location where B2B Gateway saves the mapping.

- e. If applicable, select an outbound mapping and the location where B2B Gateway saves the mapping.
- f. If the mappings contain parameters, optionally enter parameter values on the **Mapping Parameters** lists.
- g. Define a schedule for the flow.
- h. Click **Save**.

The partner you created shows on the **Explore** page.

## Partner properties for custom files with Intelligent Structure Discovery

Use the partner wizard to create or edit a partner. A partner can be either a customer or a supplier.

The partner wizard contains the following pages for custom files with Intelligent Structure Discovery:

### General page

Define partner details and message interchange details.

### Messages page

Add intelligent structures to process partner messages.

### Inbound page

Define the connection to use for the inbound flow, select a file transfer task if applicable, select a process-to-backend mapping if applicable, and define the schedule by which the flow runs.

### Outbound page

Define the connection to use for the outbound flow, select a file transfer task if applicable, select a process-from-backend mapping, select an outbound mapping if applicable, and define the schedule by which the flow runs.

## Partner general properties for custom files with Intelligent Structure Discovery

Use the **General** page of the partner wizard to define basic partner properties.

The **General** page includes the following properties for custom files with Intelligent Structure Discovery:

### Customer or Supplier Name

Name of the partner. The name can contain up to 30 characters and must be unique in the organization and can be used either for a customer or for a supplier, not for both. The name can contain alphanumeric characters, symbols, and special characters, and must not contain angled brackets (< or >).

### Customer or Supplier Number

Number of the partner. The number can contain up to 15 characters and must be unique in the organization. The number can contain alphanumeric characters, symbols, and special characters, and must not contain angled brackets (< or >).

**Tip:** Use a number that identifies the partner in your organization.

### File Type

Type of files to exchange with the partner. Select **Custom**.

### Use intelligent structure discovery

Must be enabled.

## Partner messages properties for custom files with Intelligent Structure Discovery

Use the **Messages** page of the partner wizard to select a message structure for a sample custom input file.

The **Messages** page shows the list of selected message structures, and includes the following properties:

### **Names**

Name of the message structure. The name can contain alphanumeric characters, symbols, and special characters, and must not contain angled brackets (< or >).

### **Description**

Description of the message structure. The description can contain alphanumeric characters, symbols, and special characters, and must not contain angled brackets (< or >).

### **Select Structure**

Click **Select Structure**, select a structure in the **Select Structure** page, and then click **Select**.

## Partner inbound properties for custom files with Intelligent Structure Discovery

Use the **Inbound** page of the partner wizard to define the inbound flow for the partner.

The **Inbound** page can include the following properties for custom files with Intelligent Structure Discovery:

### **Connection**

The **Connection** area includes the following properties:

#### **Connection Type**

Select the type of the connection from where B2B Gateway picks up files. You can select the following connection types:

- Advanced FTP V2
- Advanced FTPS V2
- Advanced SFTP V2
- File Servers (AS2, HTTPS, SFTP)
- Local Folder/MFT
- FTP Client
- SFTP Client

#### **Connection**

Connection where B2B Gateway creates files for the partner. Applies to the Advanced FTP V2, Advanced FTPS V2, and Advanced SFTP V2 connection types.

You configure connections in Administrator. For information about configuring the connections, see the respective connector guides.

#### **File Server User**

The file server user name for the partner from whom you receive files. Applies to the file servers connection type.

You create file server users in Administrator. For information about creating file server users, see the Administrator help.

**Host**

Host where the files that B2B Gateway picks up are located. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

**Port**

Port where the files that B2B Gateway picks up are located. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

**Source Directory**

Path to the directory on the connection from where B2B Gateway picks up files. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

**File Pattern**

Pattern that defines the names of the files that B2B Gateway picks up. The pattern must be a Java regular expression.

For example:

To pick up all files enter `.*`

To pick up only files that start with `ab` enter `ab\S.*`

**Tip:** After you configure the connection click **Test Connection** to test and validate the connection.

**File Pattern**

Select the file pattern type to pick up.

**After File Pickup**

Action that B2B Gateway performs on the files after pickup. Applies to the Advanced FTP V2, Advanced FTPS V2, and Advanced SFTP V2 connection types.

Choose one of the following options:

- **Keep Files.** Keep the files in the source location.
- **Delete Files.** Delete the files from the source location.
- **Archive Files.** Moves the files from the source location. Enter the target location in **Archive Directory**.
- **Rename Files.** Rename the files in the source location. Enter a suffix to add to the original file name in **New File Name Suffix**.

**Delete files on source after pickup**

Determines whether or not B2B Gateway deletes files after pickup. Selected by default. Applies to the Local Folder/MFT, FTP Client, and FTPS Client connection types.

**Pre-Process**

Optionally, select a file transfer task to run actions on files that you receive from the partner. Applies to the file servers connection type.



You can select one of the following file transfer tasks:

Name	Description
Decrypt	Decrypts files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decrypt" on page 96</a> .
Decompress	Decompresses files that the partner uploads to the file server before the files are sent to B2B Gateway. For more information, see <a href="#">"Decompress" on page 97</a> .

### Processing

The **Processing** area includes the following properties:

- **Process-to-Backend Mapping.** Optionally, select a mapping to process files from B2B Gateway to the organization backend system. This mapping is used for messages where a process-to-backend mapping is not associated with the message type.
- **Mapping Location.** Location where B2B Gateway saves the mapping.
- **Mapping Parameters.** Lists the mapping parameters. You can enter parameter values in the **Value** fields.
- **XML Interface Files.** Determines whether to use element names or element reference numbers in the B2B Gateway XML interface files. Applies to EDI X12 messages.

### Schedule

Schedule by which to run the flow. Select one of the following options:

- Manually or by an external trigger. No schedule. You can run the flow from the **Explore** page or from a REST API. You can also run the flow from the Partner wizard.
- By schedule. Runs the flow according to the defined schedule. Select a schedule from the list.  
**Note:** To run a flow by a schedule, users need Read and Run permissions for schedules. If permissions are not configured, users cannot see existing schedules. For more information about permissions, see ["User roles" on page 37](#).
- By file listener. Runs the flow according to the defined file listener rules. Select a file listener from the list. You create file listeners in Data Integration. For information about creating file listeners, see *Components* in the Data Integration help.

## Partner outbound properties for custom files with Intelligent Structure Discovery

Use the **Outbound** page of the partner wizard to define the outbound flow for the partner.

The **Outbound** page can include the following properties for custom files with Intelligent Structure Discovery:

### Copy Details from Inbound

Populates the fields in the **Outbound** page with the details that you entered in the **Inbound** page. You then edit the fields in the **Outbound** page as required. Applies to the File Servers, Local Folder/MFT, FTP Client, and SFTP Client connection types.

### Connection

The **Connection** area includes the following properties:

**Connection Type**

Select the type of the connection where B2B Gateway creates the files for the partner. You can select the following connection types:

- Advanced FTP V2
- Advanced FTPS V2
- Advanced SFTP V2
- AS2 Client
- File Servers (HTTPS, SFTP)
- Local Folder/MFT

**Connection**

Connection where B2B Gateway creates files for the partner. Applies to the Advanced FTP V2, Advanced FTPS V2, Advanced SFTP V2, and AS2 Client connection types.

You configure connections in Administrator. For information about configuring the connections, see the respective connector guides.

**File Server User**

The file server user name for the partner from whom you receive files. Applies to the File Servers connection type.

You create file server users in Administrator. For information about creating file server users, see the Administrator help.

**Host**

Host where B2B Gateway creates the files. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

**Port**

Port where B2B Gateway creates the files. Applies to the Local Folder/MFT, FTP Client, and SFTP Client connection types.

**Target Directory**

Path to the directory on the connection where B2B Gateway creates the files.

**Pattern Type**

Select the file name pattern type to create.

**Pattern Type**

Select the file name pattern type to create.

**File Pattern**

Select the outbound acknowledgment file name pattern.

For example:

```
{eventId}.edi
```

The patterns are not case sensitive. For more information about the file patterns that you can use in the outbound flow definition, see [“File Patterns” on page 32](#).

## Post-Process

Applies to the file servers connection type. Optionally, select a file transfer task to run actions on files that you send to the partner. You can select one of the following file transfer tasks:

Name	Description
Encrypt	Encrypts files that you send to the partner before they are upload to the file server. For more information, see <a href="#">“Encrypt” on page 96</a> .
Compress	Compresses files that you send to the partner before they are upload to the file server. For more information, see <a href="#">“Compress” on page 97</a> .

## Processing

The **Processing** area includes the following properties:

- **Process-from-Backend Mapping.** Reads outgoing data from the backend system and writes it to the B2B Gateway document store.
- **Outbound Mapping.** Optional outbound mapping that reads the files from the gateway and sends them to the partner.
- **Mapping Location.** Location where B2B Gateway saves the mapping.
- **Mapping Parameters.** Lists the parameters of the process-from-backend mapping. You can enter parameter values in the **Value** fields.

**Tip:** If required, you can temporarily override the values that you define here by defining different values in the Run Partner REST API and running the flow with the API. For more information, see [“Run Partner REST API” on page 138](#).

## Schedule

Schedule by which to run the flow. Select one of the following options:

- Manually or by an external trigger. No schedule. You can run the flow from the **Explore** page or from a REST API. You can also run the flow from the Partner wizard.
- By schedule. Runs the flow according to the defined schedule. Select a schedule from the list.

**Note:** To run a flow by a schedule, users need Read and Run permissions for schedules. If permissions are not configured, users cannot see existing schedules. For more information about permissions, see [“User roles” on page 37](#).

- By file listener. Runs the flow according to the defined file listener rules. Select a file listener from the list. You create file listeners in Data Integration. For information about creating file listeners, see *Components* in the Data Integration help.

# Editing a partner

Edit a partner on the **Explore** page.

1. Click **Explore** and navigate to the partner you want to edit.
2. Click the name of the partner that you want to edit, or click the line of the partner that you want to edit and then click the Edit button. The **Edit Customer** or **Edit Supplier** wizard appears, based on the type of partner you are editing.
3. Edit partner settings, as required, and then click **Save**.

## Running a partner flow manually

Run an inbound or an outbound partner flow from the **Explore** page.

1. Click **Explore**, and then click the line of the partner for which to run the flow. Do not click the partner name. Clicking the partner name opens the **Edit Customer** or **Edit Supplier** wizard.
2. Click the Actions button to the right of the line that you selected and then select **Run Inbound Flow** or **Run Outbound Flow**, based on the flow to run.

## CHAPTER 9

# Tracking and Monitoring Events

B2B Gateway generates events as it processes messages and files to help you track and monitor the data that you exchange with partners and of acknowledgments that the gateway sends to and receives from partners. The event list provides full visibility into the data exchange and alerts you to errors that might occur.

### Task events

Each time B2B Gateway triggers a mapping to run a partner flow, B2B Gateway generates a task event. The event is saved in Informatica Intelligent Cloud Services.

### File events

B2B Gateway generates file events for files that it receives and sends. When you exchange EDI messages with partners, you can track EDI groups, and the following message details:

- Functional groups in the file.  
**Note:** For EDIFACT messages, the existence of group level information is optional.
- Messages and transactions that are received and sent in the file.

When B2B Gateway processes custom files with Intelligent Structure Discovery, you can track events for output groups for discovered files.

You can view all events on the **Events** page. The **Events** page provides detailed information for every file and message that the system processes.

You can select a specific file event to view more details. When you drill down in an EDI file event, you see details for the messages in the file.

You can use the filter to search for specific events. You can search for events related to a specific partner, or based on event ID, type, or status, time frame, or message type or number.

You can create monitoring rules that monitor events, and notify users on events that are in a defined status, for example, create a monitoring rule that notifies users when events are in an Error status.

## File events

The Events page provides detailed event processing information for every file that B2B Gateway processes, whether inbound or outbound.

A file event shows the status of a specific file that B2B Gateway processes. For each file event in the Events page, you can view the file that B2B Gateway sends or receives by clicking the file name. If B2B Gateway sends or receives an acknowledgment for the file exchange, you can view the acknowledgment file by clicking the link on the **Acknowledgment** column.

In outbound file events, you can view the source file by clicking the source file link on the event. The source file is the file that the custom outbound mapping generates.

B2B Gateway deletes event data from the database after one year.

## Event history

You can view the event status history for each file that B2B Gateway processes.

The event history shows the processing stages that the file passed through, when each stage started, and the cumulative processing status.

The following table describes the processing stages that can show in the Event History for inbound files:

Stage	Description
Transferring incoming files	The gateway receives files from a source defined by the inbound connection.
Processing incoming files	For a custom file that Intelligent Structure Discovery processes, the message structure parses the file and produces output group (interface) files, then writes each interface file to the B2B Gateway document store. For other custom files, the custom inbound mapping writes the incoming files to an interface file on the B2B Gateway document store or writes the data to the backend system.
Processing files to backend	Processing the process-to-backend mapping.
Reprocessed from event	Indicates that the event was generated as a result of reprocessing of another event. The Event ID is presented in the status.
Reprocessed	Indicates that the event was reprocessed and a new event was generated.
Change event status to discarded	Indicates that the event status was manually changed to <b>Discarded</b> . If the user entered a reason for the change, the reason is displayed.

The following table describes the processing stages that can show in the Event History for outbound files:

Stage	Description
Processing files from backend	Processing the process-from-backend mapping.
Processing outbound mapping	The outbound mapping reads the files from the gateway and sends them to the partner.
Transferring incoming files	The gateway sends files to a target defined by the outbound connection.
Waiting for Acknowledgment (EDI X12 messages, outbound flow)	Waiting for partner to send a technical acknowledgment, a functional acknowledgment, or both.
Reprocessed from event	Indicates that the event was generated as a result of reprocessing of another event. The Event ID is presented in the status.
Reprocessed	Indicates that the event was reprocessed and another event was generated.
Change event status to discarded	Indicates that the event status was manually changed to <b>Discarded</b> . If the user entered a reason for the change, the reason is displayed.

## Event session logs

Each time an EDI processing mapping or custom mapping runs, B2B Gateway generates a task event. You can access the session log from the event.

If an error occurs during file processing, you can use the related session log to view further information about the error.

For custom files that Intelligent Structure Discovery processes, there are only session logs for the process-to-backend mapping.

For more information about the log retention policies, see [Log Retention Policies](#) Informatica Knowledge base article.

## Message details

When you drill down an EDI file event, the event expands to show message details, including details about the EDI groups in the file, if applicable, and about the transactions in the file.

For each EDI group, the validation status is presented. If an acknowledgment was sent in Inbound events or received for outbound events, it is presented for each group.

For inbound messages, message details also present the status of the custom backend mapping.

When B2B Gateway processes an inbound EDI file, the EDI process mapping converts each transaction in the file into a separate XML interface file. You can view the interface file by clicking the File icon in the **Message File** column of the message list.

## Custom file details

When B2B Gateway processes a custom file with Intelligent Structure Discovery, the parsing process converts each output group in the message structure into a separate CSV interface file.

When you drill down an inbound file event for custom files processed by Intelligent Structure Discovery, the event expands to show details of the interface files.

You can view an interface file by clicking the name of the file in the **File Name** column of the events list.

## Configuring event filters

On the **Events** page, you can use filters to monitor, track, and manage specific partners, messages, and files.

1. Click the **Filter** icon to expand the filter pane and see events based on the specified filters.  
The event list updates to show the relevant events. By default, the event list shows all events from the last 24 hours.
2. Select the **Display deleted partners** field to view events for deleted partners with an event history in view-only mode.

- After you filter the view of the list, click **Restore Defaults** to restore the default view.
- You can save a filter for reusing it later. You can provide a name for the filter in the **Filter Name** field and click **Save Filter** to save the filter. The filter name must not contain angular brackets.
- Click **Set Filter As Default** to set an event filter as default. This option enables you to set the filter with predefined values whenever you open the **Events** page.
- Click the **Filters** field.

The following options appear:

- Select.** Click the **Select** option to select an event filter from a list of saved event filters.
  - Manage.** Click the **Manage** option to manage or delete an event filter from a list of event filters.
- Click **Download Events As Csv** to download details of all the events in a CSV file format. You can view details of a maximum of 2000 events only.

## Event properties

The **Events** page shows file events. File event properties include details about the file that B2B Gateway processed.

When you drill down an EDI file event, the **Events** page shows message details for the file, including details about the EDI groups and the messages that B2B Gateway processed for the file, and the message processing status.

When you drill down a custom file event for files processed by Intelligent Structure Discovery, the event expands to show details for output groups discovered in the message structure. For each output group that is processed, the name of the interface file and the event ID show.

## File event properties

File event properties include the file that B2B Gateway processed, when the file was processed, which partner sent or received the file, the processing status, and other details.

The following image shows the file events on the **Events** page:

The screenshot shows the 'Events' page in the B2B Gateway interface. At the top, there's a header with 'Events' and 'Event Status' links. Below the header, there's a filter bar with options for 'Message: Type' (All), 'Number' (Number), 'Partners' (All), and 'Time' (Last 24 hours). There are also buttons for 'Select Partners...', 'Display deleted partners', 'Partner Tags', and 'Restore Defaults'. Below the filter bar, there's a table with the following columns: File Name, Partner Name, Event ID, Time, Status, and Acknowledgment. The table contains 10 rows of event data. At the bottom, there's a pagination bar with 'Previous', '1', and 'Next' links.




File Name	Partner Name	Event ID	Time	Status	Acknowledgment
X12_7010_876_Valid.edi	x12-24-10-29-9PW	34061224	29/10/2024 04:15:46 AM	✓	TA1
IFTSAI_99B_valid.txt	Edifact_24-10-29-J1L	34060800	29/10/2024 04:15:13 AM	✓	Contnl
atlanticE2E_inputFile.csv	atlantic-24-10-29-WDY	34061138	29/10/2024 04:11:00 AM	✓	
Edifact_24-10-29-J1L_IFTSAI_0_0grou...	Edifact_24-10-29-J1L	34060717	29/10/2024 04:10:55 AM	✓	
output_34060718_atlantic-24-10-29-W...	atlantic-24-10-29-WDY	34060718	29/10/2024 04:10:49 AM	✓	
x12_810_034061140_34061140_2024_...	x12-24-10-29-9PW	34061140	29/10/2024 04:10:42 AM	✓	
X12_7010_876_Valid.edi	x12-24-10-28-HF3	34047276	28/10/2024 08:15:37 PM	✓	TA1
IFTSAI_99B_valid.txt	Edifact_24-10-28-QA9	34047273	28/10/2024 08:15:10 PM	✓	Contnl
atlanticE2E_inputFile.csv	atlantic-24-10-28-ZJQ	34047192	28/10/2024 08:11:02 PM	✓	



The display for file events includes the following properties:

#### File Type

The icon on the left side of the **Events** page indicates the file type:

-  inbound file.
-  inbound acknowledgment file.
-  outbound file.

#### File Name

The name of the file that the gateway received from the partner or sent to the partner. Click the file name to open the file.

#### Partner Name

The name of the partner that sent or received the message or the file. Click the partner name to open the edit partner wizard.

#### Event ID









Unique identifier for the event.


#### Time

The time the event started.

#### Status

Status of the event. An event can be in one of the following statuses:

- Complete . The file processing completed successfully.
- Discarded . The event status was manually changed to **Discarded**. Discarded events are read-only and cannot be handled any further.
- Downloading . The file is downloading.
- Error . An error occurred during file processing.
- Processing . A mapping is processing the file.
- Reprocessed . The event was reprocessed and another event was generated to reflect the new process.
- System Error . A system error occurred unrelated to file processing.
- Waiting for Acknowledgment . An intermediate status of an outbound event that is waiting for an acknowledgment. The final status of the outbound event corresponds to the status of the received acknowledgment. If the acknowledgment is accepted, the status of the corresponding outbound event changes to Complete. If the acknowledgment is rejected, the status of the corresponding outbound event changes to Error.

- Warning . The event generated a warning. For example, when an acknowledgment does not contain a group control number of the source message.

Rest on an event status icon to show additional information. For example, for an event in an Error status, the error that occurred during file processing .

### Acknowledgment

Applicable for EDI X12 messages. Indicates whether an acknowledgment was received. Rest on the acknowledgment link to view the acknowledgment event number. Click the acknowledgment link to open the acknowledgment file.

For both incoming and outgoing file events, to view the file processing steps, click **History**. To view the session log for the associated mapping, click **Session Log**. For outgoing file events, to view the source file that the custom mapping generated, click **Source File**.

## EDI message details properties

When you drill down an EDI file event, you see further details for the EDI groups and messages that the gateway processed for the EDI file. The message details identify the EDI groups, transactions, message types, and acknowledgments that B2B Gateway processed, as relevant for the message.

To drill down a file event, click the triangle to the left of the file event row. The message event panel appears.

The following image shows sample details for an incoming EDI file:

810\_4010\_SuplB.edi

FoodInd

66074

15/11/2016 12:23:06 PM

TA1

History | Session Log

EDI Groups

Message Type	Group Control Number	Event Id	Status	Acknowledgment
810 Invoice	4201	66076	<div></div>	997

Message Processing :  Complete

Session Log

Message Type	Number	Group Control Number	Message Control Number	Event Id	Message File
810 Invoice	<div><div></div>DO091003TESTINV01TAX</div>	4201	1	66078	<div><div></div>edi</div>
810 Invoice	<div><div></div>DO091003TESTINV01TAX</div>	4201	2	66079	<div><div></div>edi</div>

The message details panel displays the EDI groups in the file, the message processing status, and the transactions in the file. Incoming EDI files can include multiple EDI groups. Outgoing EDI files contain one EDI group.

When the view includes multiple EDI groups for a file, click the row of an EDI group to show the transactions that are associated with the group.

### EDI group details

The **EDI Groups** panel displays details for each functional group in the EDI file.

For each functional group in the file, the **EDI Groups** panel includes the following properties:

#### Message Type

Message type for the functional group.

#### Group Control Number




Control number for the functional group.

#### Event ID

Unique identifier for the event associated with processing the EDI group.

## Status

Status of the group validation for the EDI group. This appears for inbound messages. Group validation can be in one of the following statuses:

- Complete . B2B Gateway completed the message validation for the functional group successfully.
- Error . Group validation failed. Click the File icon to open a report with details about the error.
- Waiting for Acknowledgment . Waiting for an acknowledgment from the partner.

Rest on an EDI group status icon to show additional information. For example, for an event in an Error status, the reason that the message was rejected.



## Acknowledgment

Indicates whether B2B Gateway sent or received a functional acknowledgment for the EDI group. Click the acknowledgment number to open the acknowledgment file.

## Message processing status

The **EDI Groups** panel displays message processing status for the custom mapping that is assigned to the flow.

The **Message Processing** icon indicates the message processing status for the mapping. Message processing can be in one of the following statuses:

- Complete . B2B Gateway processed the custom mapping successfully or no custom mapping is assigned to the flow.
- Error . Processing of the custom mapping failed.

To view the session log associated with the processing of the custom mapping, click **Session Log**. If no custom mapping is assigned to the flow, session log details are not available.

## Transaction details

The message details panel displays details for each transaction in the EDI file. If you click the row of the EDI group, only the transactions that B2B Gateway processed for the specific EDI group are listed.

For each transaction, the message details panel can include the following properties:

### Message Type

Indicates the message type of the transaction.

### Number

Transaction number, for example, invoice number. Rest on the information icon to the left of the transaction number to view the number of rows in the transaction.

### Group Control Number

The group control number for the functional group of the transaction.

### Message Control Number

The message control number for the transaction.

### Event ID

Unique identifier for the event associated with processing the transaction.

### Message File

Applicable for inbound flows. The XML file that B2B Gateway generates for the inbound message. Click the File icon to view the file.

### Acknowledgment

Applicable for outbound flows. Rest on the acknowledgment link to view the acknowledgment event number. Click the acknowledgment link to open the acknowledgment file.

## Custom file details properties

When Intelligent Structure Discovery processes a file, it discovers output groups. Output groups contain units of identified data, such as a street address, city, and zip code. An interface file is created for each discovered output group. When you drill down a custom file event for files that Intelligent Structure Discovery has processed, you see further details for the interface files that were produced.

To drill down a file event, click the triangle to the left of the file event row. The **Discovered File** panel appears.

The following image shows sample details for an incoming custom file that Intelligent Structure Discovery processed:

▼	3groupUnidentified.xls	AtlanticMultiFiles...	3173	18/04/2017 03:13:25 AM	✓	History   Session Log
Discovered Files (3) Unidentified Data						
File Name		Event Id ▼				
3174.attributes.csv		3174				
3175.element2.csv		3175				
3176.element1.csv		3176				

The details panel displays the interface file that was produced, and the processing status.

Incoming custom files can produce multiple interface files, depending on the custom file structure.

## Discovered Files

For each interface file, the **Discovered Files** panel includes the following properties:

### File Name

Name of the interface file. Click the name of the file to view the file.


### Event ID



Identification number for the event.

## Processing Status

The **Discovered Files** panel displays the processing status for the inbound process that includes Intelligent Structure Discovery to parse the custom file.

The **Processing** icon indicates the inbound processing status. The processing state can be in one of the following statuses:

- Complete  B2B Gateway processed the file successfully.

- Error  . File processing failed.
- Warning  . The Intelligent Structure Discovery process was unable to identify some of the data, and no process-to-backend mapping has been defined.

## Unidentified Data

If Intelligent Structure Discovery was not able to identify all the data, the **Discovered File** panel displays the link **Unidentified Data**.

The data that was not processed is saved to a file with the naming convention `<original filename>_unidentified.txt`.

To access the data, click the link **Unidentified Data**.

# Viewing and managing events

You can view file events and message details in the Events page. You can also use a filter to find specific events. You can also reprocess or discard a file event.

1. Click **Events**.

A list of file and system events appear.

2. To filter events, click the Filter icon. In the Filter pane, select to view events related to a specific partner, to an event ID, type, or status, to a selected time frame, or to message type or number.

When you select the event ID, event and file processing details are displayed for that event. For more information about configuring event filters, see [“Configuring event filters” on page 127](#).

3. To view the file for a file event, click the name of the file.
4. To view partner details for a file event, click the name of the partner.
5. To view EDI message type events related to a file event, drill down the file event. Click the arrow to the left of the row of a specific file event.
6. To view the source file for an outbound flow, select to highlight the file event row, select the Action menu and then select **Source File**.
7. To troubleshoot an error, view the session log for an event. Select to highlight the file event row, select the Action menu and then select **File Session Log** or **Custom Process Session Log**.
8. To discard a file event and stop handling the file, select to highlight the file event row, select the Action menu and then select **Discard Event**. You can enter a reason for the discard.
9. To reprocess a file event, select to highlight the file event row, select the Action menu and then select **Reprocess**.

The event is assigned the **Reprocessed** status and another event is created for the new process flow.

**Note:** Only file events can be reprocessed. You cannot reprocess custom partner events that use Intelligent Structure Discovery, or system error events.

# Event monitors

You can create event monitors that track events based on their status, and send notifications when an event is in a defined status.

You create monitoring rules that define which partners to monitor, what are the event statuses that trigger an action, and users to which to send email notifications. For example, you can create a rule that notifies the administrator when events that are generated for a specific partner are in an Error status.

## Monitoring rules

A monitoring rule defines which partners to monitor, the event statuses that trigger an action, and the users to which to send email notifications when an event is in a defined status.

When you create a monitoring rule, you define the following elements:

- Partners to which the rule applies. You can apply the rule to a single partner, to a number of selected partners, or to all partners.
- Event status or statuses to which the rule applies. B2B Gateway applies the rule only to events that are in a final state.
- Rule action. You can define one or more users to which B2B Gateway sends email notifications when the rule conditions are true.

## Managing Monitoring Rules

Create, edit, view, disable, enable, and delete monitoring rules.

### Creating a monitoring rule

Use the Navigator to create monitoring rules.

1. In the Navigator, click **New > Monitoring > Monitoring Rule**. Then click **Create**.  
The **New Monitoring Rule** page appears.
2. Enter the rule name. Optionally, enter a description for the rule.
3. Select the location to save the rule.
4. Choose the rule mode, enabled or disabled. A disabled rule does not perform the defined actions.
5. Select a partner or partners to which to apply the rule, or select **Apply to all** to apply the rule to all partners, including current partners and partners that are added to B2B Gateway after you create the rule.
  - a. Click **Select Partners**.  
The **Partners** page appears.
  - b. Check the box to the left of the partners to apply the Monitoring Rule, and then click **Select**.
  - c. To remove a partner, check the box to the left of the partner and click the trash icon.
6. Select the event statuses to monitor. You must select at least one status.
7. Define users to which to send email notifications. You can define up to 30 email users.

Perform the following steps for each user:

1. Click **Add** in the **Actions** area.
2. Select the name of an Informatica Cloud user or select **A non-Informatica Cloud user** from the **User Name** list and then enter the email address in the **Email** field.

B2B Gateway sends email notifications to the recipients that you define here when events of any of the affected partners are in any of the affected statuses.

8. Click **Save**.

## Editing a Monitoring Rule

Use the **Explore** page to edit monitoring rules.

1. In the Navigator, click **Explore**. Click the **All Assets** list and then select **Monitors > Monitoring Rules**.  
The **Explore** page shows all existing monitoring rules.
2. Click the name of the monitoring rule to edit.  
The monitoring rule page shows.
3. Edit the monitoring rule and then click **Save**.

## Disabling and enabling a monitoring rule

Use the **Explore** page to disable and enable a monitoring rule.

1. In the Navigator, click **Explore**. Click the **All Assets** list and then select **Monitors > Monitoring Rules**.  
The **Explore** page shows all existing monitoring rules.
2. In the row that contains the rule, click **Actions** and select one of the following actions:

## Monitoring rule properties

Monitoring rule properties include general information about the monitoring rule, the assets that the rule applies to, the event statuses that the rule monitors, and the rule actions.

The following image shows a sample monitoring rule page:

The screenshot shows the 'New Monitoring Rule' page. The 'General' section contains the following fields:

- Rule Name \***: A text input field.
- Description**: A text input field.
- Location \***: A dropdown menu with 'Default' selected and a 'Browse' button.
- Mode**: Radio buttons for 'Enabled' (selected) and 'Disabled'.
- Content**: A text area with the placeholder 'Rule not fully defined'.
- Notify After**: A numeric input field set to '0' with a unit of 'minutes'.

Below the General section are three expandable sections:

- Affected Partners**: (No partner selected)
- Affected Statuses**: (No status selected)
- Actions**: (No action selected)

The monitoring rule page includes the following properties:

**Rule Name**

Name of the monitoring rule. The name can contain up to 80 characters and can contain special characters. The name must not contain angled brackets (< or >).

**Description**

Description of the monitoring rule. The description can contain up to 255 characters.

**Mode**

Monitoring rule mode, enabled or disabled. A disabled rule does not perform the defined actions.

**Content**

The conditions of the monitoring rule.

**Notify After**

Enter a wait time after which a notification will be sent for an event in the **Waiting for acknowledgement** status. Enter a value between 0 and 120 minutes.

**Affected Partners**

The partners that the rule applies to.

**Affected Statuses**

The statuses of the affected assets that the rule applies to. Select one or more of the following statuses:

- Complete
- Discarded
- Error
- Reprocessed
- System Error
- Waiting for acknowledgment
- Warning

**Actions**

The users to send email notifications to. Click **Add** to add a user and then enter the user name and email address.

## Custom event status management

In B2B Gateway, you can create and manage custom event statuses in the **Events> Events Status** page. You can manage a custom event status to indicate the progress of an event while B2B Gateway processes it.

You can update the custom event status for custom file type events at run time using the B2B transformation that is available in the mappings of Data Integration. Using the B2B transformation, you can either pass the event status as a parameter or select an event status name that is configured in B2B Gateway.

For more information about using the B2B transformation in a Data Integration mapping, see the *Data Integration* help.

You can create, edit, and delete a custom event status.



## Creating a custom event status

Use the Navigator in B2B Gateway to create custom event statuses. The custom event status appears with a hyperlink on the **Event Status** page. You can click the hyperlink to view the details of the custom event status.

1. In the Navigator, click **Events > Event Status**.  
The **Event Status** page appears.
2. To create a custom event status, click **Create Event Status**.  
The **New Event Status** page appears.
3. Define the following custom event status properties:
  - **Event Status Name**. Enter a unique name for the event status.
  - **Icon**. Select an icon to represent the event status.
  - **State**. Select the state of the event status that will determine how B2B Gateway processes a custom event.
    - **Error**. Select this option to denote that issues exist in the partner flow and you do not want to end the process.
    - **Final**. Select this option to end the process.
4. Click **Save**.

## Managing a custom event status

Use the Navigator in B2B Gateway to update or delete a custom event status.

1. In the Navigator, click **Events > Event Status**.  
The **Event Status** page with a list of pre-defined and custom event statuses appears.
2. To edit an event status, click the **Edit** icon next to the event status that you want to edit and change the event status properties on the **Edit Event Status** page.
3. Define the following event status properties:
  - **Event Status Name**. Enter an unique name for the event status.
  - **Icon**. Select an icon to represent the event status.
  - **State**. The state of the event status that will determine how the system processes a custom event.
    - **Error**. Choose the option if you want to denote the issues and do not want to end the process.
    - **Final**. Choose the option if you want to end the process.
4. To delete an event status, in the **Event Status** page, click the **Delete** icon next to the event status that you want to delete and confirm the deletion. You can't delete a system-defined event status or a custom event status that is assigned an event.

## CHAPTER 10

# B2B Gateway REST APIs

Use the B2B Gateway REST APIs to run inbound and outbound partner flows, to query the status of events, and to get control numbers for outbound EDI X12 and EDIFACT messages.

You can use the following APIs:

- Run Partner REST API. Runs inbound and outbound partner flows.
- Event Status REST API. Returns the status of events.
- Get Control Number REST API. Returns the next control number for outbound EDI X12 and EDIFACT messages, including outgoing acknowledgments.

## Authorization Header

Each B2B Gateway REST API call must contain an authorization header.

The type of the authorization header must be Basic, and the header must include an Informatica Intelligent Cloud Services user and an Informatica Intelligent Cloud Services password.

For example:

```
{
  Username: Administrator@MyCompany.com
  Password: MyPassword
}
```

## Run Partner REST API

Use the B2B Gateway Run Partner API to run inbound and outbound partner flows.

You can use the Run Partner API only for flows with the scheduling option **Manually or by an external trigger**.

When you run an outbound flow with the Run Partner REST API, if the process-from-backend mapping contains parameters, you can pass the parameter values in the API request. When you run the partner with the API, the values that you define in the API override those that you define in the partner flow.

For example, one of the mapping parameters is the shipment number, and you define the value in the outbound partner flow. If you need to send a one-time message with a different shipment number, run the flow with the API and assign the shipment number parameter a different value.

If you later reprocess the file event, B2B Gateway doesn't run the flow with the API. Therefore, it passes the parameter values that you define in the partner flow, not those that you define in the API.

The Run Partner API returns the response code of the action that you perform. If the partner flow triggers successfully, the API returns the event ID of the task event that B2B Gateway generates. You can run the B2B Gateway Event Status API to query the status of the event based on the event ID.

When you run partner flows, you can also include the mapping task advanced session parameters in the Run Partner API using the `mctAdvSessionProperties` object. Any mismatch between the API parameters and the session parameters will appear as a runtime error in the Events page.

## Run Partner REST API request

Use a POST request with an `application/json` content type to run a partner flow.

To run a flow, use the following REST URL:

```
https://use6-b2bgw.dm-us.informaticacloud.com/b2b-gw/api/v1/partner/run
```

Where:

- `<pod>` is the name of the Informatica Intelligent Cloud Services point of delivery (PoD) where you access B2B Gateway. For example: `pod1`.
- `<baseUrl>` is the Informatica Intelligent Cloud Services URL. For example: `dm-us.informaticacloud.com/`.

For example:

```
https://use6-b2bgw.dm-us.informaticacloud.com/b2b-gw/api/v1/partner/run
```

**Tip:** You can copy the values of `<pod>` and `<baseUrl>` from the B2B Gateway URL after you access it from the My Services page of Informatica Intelligent Cloud Services.

### Request syntax

To run a flow, use the following request syntax:

```
{
  "partnerName":"<partner name>",
  "direction":"<direction of flow>"
}
```

Where:

- `partner name` is the name of the partner to run the flow for. The name must not contain angled brackets (`<>`), backslashes (`\`), or double quotes (`"`). If the defined partner name contains backslashes, add another backslash before each existing backslash (`\\`). If the defined partner name contains double quotes, add a backslash before each double quote (`\"`).
- `direction of flow` is the flow to run for the customer: `INBOUND` for an inbound flow and `OUTBOUND` for an outbound flow. The direction is not case sensitive.

For example:

To run the inbound flow for the customer `My_Customer`, use the following request syntax:

```
{
  "partnerName":"My_Customer",
  "direction":"INBOUND"
}
```

To run the outbound flow for the customer `My_Customer`, use the following request syntax:

```
{
  "partnerName":"My_Customer",
  "direction":"OUTBOUND"
}
```

When you run partner flows, you can also include the mapping task advanced session parameters in the Run Partner API using the `mctAdvSessionProperties` object.

Use the following request syntax that includes the buffer block size as advance session mapping parameter session when you run an inbound flow:

```
{
  "partnerName":
    "<Customer name>",
  "direction": "INBOUND",
  "mappingParameters": {
    "inputParameters": {"param": "no"},
    {
      "inOutParameters": {
        "ob_customer_param": "<parameter value>"
      },
      {"mctAdvSessionProperties":
        {"Default buffer block size": "<Buffer block size in megabytes>"
        }
      }
    }
  }
}
```

Use the following request syntax that includes the buffer block size as advance session mapping parameter session when you run an outbound flow:

```
{
  "direction": "outbound",
  "partnerName": "ob_with_parameters",
  "mappingParameters":
    {
      "inputParameters":
        {
          "param": "no"
        },
      "inOutParameters":
        {
          "ob_customer_param": "60"
        },
      "mctAdvSessionProperties": {
        "Default buffer block size": "18MB"
      }
    }
}
```

The following table shows the sample Run Partner REST API request and the corresponding response:

Request	Response
<pre>{   "partnerName": "sony_out_ER-32909",   "direction": "INBOUND",   "mappingParameters": {     "mctAdvSessionProperties": {       "Default buffer block size": "18MB"     }   } }</pre>	<pre>{   "responseStatus": "SUCCESS",   "responseExtraMessage": "",   "responseType": "/v1/partner/run",   "eventId": 15648046 }</pre>

## Pass parameter values in outbound flows

You can pass the values of process-from-backend mapping parameters in the Run Partner REST API request.

To pass parameter values in the request, add a "mappingParameters" section to the request body. The section can include one or both of the following categories:

- "inputParameters". Contains one or more key-value pairs of input parameters.
- "inOutParameters". Contains one or more key-value pairs of in-out parameters.

Use the following syntax for the key-value pairs:

```
"<mapping parameter name>": "<parameter value>"
```

For example:

To run the outbound flow for the customer `My_Customer` and pass the values of the invoice number and the shipment number in the request, use the following syntax:

```
{
  "partnerName": "My_Customer",
  "direction": "OUTBOUND",
  "mappingParameters": {
    "inputParameters": {
      "Invoice_Number": "7800"
    },
    "inOutParameters": {
      "Shipment_Number": "A3065"
    }
  }
}
```

## Run Partner REST API action response

When you use the B2B Gateway Run Partner REST API to run a partner flow, B2B Gateway returns the action response in the REST API response.

Running a flow from the REST API returns the HTTP response code that is relevant to the result of the action

- When the request succeeds, B2B Gateway returns `200`, the code for a successful request.
- When the request fails, the API returns the HTTP response code that is relevant to the cause of the error. For example, if the value of `direction` is wrong, the API returns `400`, the code for a bad request.

## Event Status REST API

When you use a B2B Gateway Run Partner REST API to trigger a mapping to run a partner flow and the action succeeds, B2B Gateway returns the event ID of the task event that it generates in the REST API response.

You can use the B2B Gateway Event Status REST API to query the status of the event, based on the event ID.

When you query a task event and the event reaches its final status, the API returns the event IDs of all the file events that the mapping generated. You can then run the API to query the status of each file event.

A task event reaches its final status when the mapping finishes running. A file event reaches its final status when the file processing is complete. Processing is complete when all task and file events are in a final status.

## Event status REST API request

Use a GET request with an `application/json` content type to query the status of a partner event.

To query the status of a partner event, use the following REST URL:

```
https://b2bgateway.<pod>.<baseUrl>/b2b-gw/api/v3/event/status/eventId
```

Where:

- `<pod>` is the name of the Informatica Intelligent Cloud Services point of delivery (PoD) where you access B2B Gateway. For example: `pod1`.
- `<baseUrl>` is the Informatica Intelligent Cloud Services URL. For example: `dm-us.informaticacloud.com/`.

For example:

```
https://use6-b2bgw.dm-us.informaticacloud.com/b2b-gw/api/v3/event/status/7638
```

**Tip:** You can copy the values of `<pod>` and `<baseUrl>` from the B2B Gateway URL after you access it from the My Services page of Informatica Intelligent Cloud Services.

## Event Status API action response

When you use the B2B Gateway Event Status API to query the status of task and file events, the API returns the event response in a JSON format.

When the request fails, the API returns the HTTP response code that is relevant to the cause of the error. For example, if the event you query is of an unsupported type, such as a group event, the API returns 400, the code for a bad request. When file processing fails, the event is in Error status.

### Success response for task events

When you query the status of task events and the request succeeds, the response includes the following information about the event:

Property	Description
eventType	Type of event: Task Level Event.
eventStatus	Status of the event.
eventId	ID of the event.
eventCreationTimestamp	Time when the event occurred. System time in milliseconds as returned by Java API <code>java.lang.System.currentTimeMillis</code> .
partnerName	Name of the partner.
partnerNumber	Number of the partner.
partnerFileType	Type of files that are exchanged with the partner.
direction	Direction of the partner flow, INBOUND or OUTBOUND.
isErrorStatus	Indicates whether or not the event is in error status.
isFinalStatus	Indicates whether or not the event reached its final status.
files	List of files that were exchanged with the partner, including details of each file event.

## Success response for file events

When you query the status of a task event or a file event and the request succeeds, the response includes the following information for each file event:

Property	Description
eventType	Type of event: File Level Event.
eventStatus	Status of the event.
eventId	ID of the event.
eventCreationTimestamp	Time when the event occurred. System time in milliseconds as returned by Java API <code>java.lang.System.currentTimeMillis</code> .
parentEventId	ID of the parent task event.
messageType	Type of message that is exchanged with the partner.
ackCode	Correlated acknowledgment status.
ackCodeDescription	Description of correlated acknowledgment status.
fileName	Name of the file.
interchangeControlNumber	Interchange control number.
groupList	If the file event includes groups, list of group events, including details of each group event and the group's transaction events.
transactionList	If the file event includes transactions that aren't nested under groups, list of transaction events, including details of each transaction event.
sectionList	If the file event includes sections, list of section events, including details of each section event. Applies to inbound custom files with Intelligent Structure Discovery.
hasUnidentifiedData	Indicates whether or not the file includes unidentified data. Applies to inbound custom files with Intelligent Structure Discovery.
isErrorStatus	Indicates whether or not the event is in error status.
isFinalStatus	Indicates whether or not the event reached its final status.

## Group event details

If a file event includes groups of transactions, the file event success response includes group events.

A group event includes the following information:

Property	Description
eventType	Type of event: Group Level Event.
eventStatus	Status of the event: Complete or in progress.

Property	Description
eventId	ID of the event.
eventCreationTimestamp	Time when the event occurred. System time in milliseconds as returned by Java API <code>java.lang.System.currentTimeMillis</code> .
parentEventId	ID of the parent file event.
messageType	Type of message that is exchanged with the partner.
ackCode	Correlated acknowledgment status.
ackCodeDescription	Description of correlated acknowledgment status.
groupControlNumber	Group control number.
transactionList	List of transaction events, including details of each transaction event.
isErrorStatus	Indicates whether or not the event is in error status.
isFinalStatus	Indicates whether or not the event reached its final status.

## Transaction event details

If a file event includes transactions, the file event success response includes transaction events. Transaction events can be nested directly under the file event or under group events.

A transaction event includes the following information:

Property	Description
eventType	Type of event: Transaction Level Event.
eventStatus	Status of the event: Complete or in progress.
eventId	ID of the event.
eventCreationTimestamp	Time when the event occurred. System time in milliseconds as returned by Java API <code>java.lang.System.currentTimeMillis</code> .
parentEventId	ID of the parent event, either a file event or a group event.
messageType	Type of message that is exchanged with the partner.
ackCode	Correlated acknowledgment status.
ackCodeDescription	Description of correlated acknowledgment status.
number	Transaction number.
messageControlNumber	Message control number.
groupName	ID of the parent group. Applies to transactions that are nested under groups.



Property	Description
isErrorStatus	Indicates whether or not the event is in error status.
isFinalStatus	Indicates whether or not the event reached its final status.

## Section event details

If a file event includes sections, the file event success response includes section events.

A section event includes the following information:

Property	Description
eventType	Type of event: Section Level Event.
eventStatus	Status of the event: Complete or in progress.
eventId	ID of the event.
eventCreationTimestamp	Time when the event occurred. System time in milliseconds as returned by Java API <code>java.lang.System.currentTimeMillis</code> .
parentEventId	ID of the parent file event.
messageType	Type of message that is exchanged with the partner.
sectionName	Name of the section.
fileName	Name of the file. Applies when messageType is File.
isErrorStatus	Indicates whether or not the event is in error status.
isFinalStatus	Indicates whether or not the event reached its final status.

# Get Control Number REST API

Use the B2B Gateway Get Control Number REST API to get the next control number for outbound EDI X12 and EDIFACT messages, including outgoing acknowledgments.

B2B Gateway increases the current control number for the partner that you specify in the request and the API returns the next number in the sequence. You can use the number that the API returns as the control number in the next outbound message you send to the same partner with a custom mapping.

## Get Control Number REST API request

Use a GET request with an application/json content type to get the next control number for outbound EDI X12 and EDIFACT messages.

To get the next control number for a partner, use the following REST URL:

```
https://b2bgateway.<pod>.<baseUrl>/b2b-gw/api/v1/partner/controlNumber/getNext
```

Where:

- **<pod>** is the name of the Informatica Intelligent Cloud Services point of delivery (PoD) where you access B2B Gateway. For example: pod1.
- **<baseUrl>** is the Informatica Intelligent Cloud Services URL. For example: dm-us.informaticacloud.com/.

For example:

```
https://use6-b2bgw.dm-us.informaticacloud.com/b2b-gw/api/v1/partner/controlNumber/getNext
```

**Tip:** You can copy the values of **<pod>** and **<baseUrl>** from the B2B Gateway URL after you access it from the My Services page of Informatica Intelligent Cloud Services.

### Request Syntax

To request the control number, use the following request syntax:

```
{
  "partnerName": "<partner name>",
  "controlNumberType": "<type of control number>"
}
```

Where:

- **partner name** is the name of the partner to get the control number from. The name must not contain angled brackets (<>), backslashes (\), or double quotes ("). If the defined partner name contains backslashes, add another backslash before each existing backslash (\\). If the defined partner name contains double quotes, add a backslash before each double quote (\").
- **type of control number** is the type of control number that the partner uses: *Interchange* for an interchange control number or *Group* for a group control number.

For example:

To get an interchange control number, use the following request syntax:

```
{
  "partnerName": "My_Customer",
  "controlNumberType": "Interchange"
}
```

To get a group control number, use the following request syntax:

```
{
  "partnerName": "My_Customer",
  "controlNumberType": "Group"
}
```

## Get Control Number REST API Action response

When you use the B2B Gateway Get Control Number REST API to get the next control number for a partner, B2B Gateway returns the next control number in the sequence.

When the request fails, the API returns an error code or a message that describes the cause of the failure.

## Get Control Number REST API success response

When you use the B2B Gateway Get Control Number REST API to get the next control number for a partner, the success response includes the following information:

Property	Description
responseStatus	Status of the response: SUCCESS.
responseExtraMessage	Additional information, if applicable.
responseType	Type of response: /v1/partner/controlNumber/getNext.
controlNumber	The next control number in the sequence for the partner.

For example:

```
{
  "responseStatus": "SUCCESS",
  "responseExtraMessage": "",
  "responseType": "/v1/partner/controlNumber/getNext",
  "controlNumber": 179
}
```

## Get Control Number REST API failure response

When the B2B Gateway Get Control Number REST API fails to get the next control number for a partner, the failure response includes the error code and a description of the cause of the failure.

A failure response can include one of the following messages:

Error code	Message	Reason for failure
400	Can't get the next control number because a sequence isn't defined for the type of control number that you requested.	The control number type specified in the request is either invalid or doesn't match the control number type that the partner uses.
404	The requested resource was not found: [The partner [<partner name>] does not exist.	A partner with the name specified in the request doesn't exist.
500	Can't get the next control number because the sequence reached the maximum number of digits. Reset the sequence in the partner message properties and try again.	The control number sequence for the partner reached the maximum number of digits. The allowed number of digits in control numbers is nine digits for EDI X12 messages and 14 digits for EDIFACT messages.

Error code	Message	Reason for failure
500	Can't get the next control number for this partner because the partner uses file event IDs and not sequences as control numbers.	The partner uses event IDs as control numbers in outbound messages. You can get the next control number only for partners that use sequence numbers as control numbers.
500	Can't get a control number because the partner flow uses custom files with custom mappings, which don't use control numbers.	The partner uses custom files with custom mappings. You can use the Get Control Number REST API only with partners that use EDI X12 or EDIFACT messages.

## Download Event Grid REST API

You can use a **Download Event Grid REST API** request with an application/json content type to download a JSON output of event grid details for an organisation. The JSON output can be easily shared or stored locally. You can download a JSON response of events for a specific time period.

The JSON output contains details of a maximum of 2000 events.

To download the output, use the following URL:

`https://b2bgateway.<pod>.<baseUrl>/b2b-gw/api/v1/event/downloadEventDetails`

Where:

- `<pod>` is the name of the Informatica Intelligent Cloud Services Point of Delivery (PoD) from which you access B2B Gateway .
- `<baseUrl>` is the Informatica Intelligent Cloud Services URL. For example: `dm-us.informaticacloud.com/` .

You can copy the values of pod and base Url from the B2B Gateway URL after you access it from the My Services page of Informatica Intelligent Cloud Services.

## Download Event Grid REST API request

Use a POST request with an application/json content type to download a JSON output of event grid within an organisation.

The following table describes the request body parameters of the request URL:

Parameter	Type	Description
eventId	String	The ID of the event.
fromDate	String	The date from when the events are required to be filtered. The value in this field is displayed in Unix time format or Epoch time in which the date is converted to milliseconds.

Parameter	Type	Description
Todate	String	The date till when the events are required to be filtered. The value in this field is displayed in Unix time format or Epoch time in which the date is converted to milliseconds.
messageTypeNames	String	The type of messages that you exchange with partners.
entityNumber	String	The identification number of an external or internal entity that sends documents for processing or receives documents after processing in B2B Gateway.
statuses	String	The status details of the events.
eventTypes	String	The type of the event.
showDeleted	String	The details of the deleted partners field.
internalPartnerIDList	String	The list of internal partners.
partnerTags	String	The tags that are labels you create to help organize the partners.
resultSize	String	The size of the result after filtering the events.

The following example shows a sample request:

```
{
  "eventId":34046598, "fromDate":1730042349474,
    "toDate":1730128749474,
    "messageTypeNames":["810"],
    "entityNumber":null,
    "statuses":["Complete"],
    "eventTypes":["OUTBOUND"],
    "showDeleted":false,
    "internalPartnerIDList":[75226],
    "partnerTags":[],
    "resultSize":2000
}
```

## Download Event Grid REST API response

When you make the B2B Gateway Download Event Grid REST API, the REST API returns the event response in a JSON format.

The following table describes the response attributes of the response:

Parameter	Type	Description
eventType	String	The type of the event that is defined in the Operation Console.
eventStatus	String	The status of the event.
eventId	String	The ID of the event.
eventCreationTimestamp	String	The time of the event creation.
parentEventId	String	The ID of the parent event.
messageType	String	The type of messages that you exchange with partners.
fileName	String	Name of the inbound or outbound files.
interchangeControlNumber	String	An identifier generated internally by B2B gateway for each message.
number	String	The unique identification number of the message based on the message type.
messageControlNumber	String	The transaction number, for example, invoice number.
groupName	String	The group control number for the functional group of the transaction.
isErrorStatus	String	Indicates if the event displays an error. Returns <b>True</b> if an event indicates an error; otherwise, returns <b>False</b> .
isFinalStatus	String	Indicates whether the event is in a final state. Returns <b>True</b> if the event status is final; otherwise, returns <b>False</b> .

The following table describes the response parameters for the JSON output:

```
[
  {
    "eventType": "File Level Event",
    "eventStatus": "Complete",
    "eventId": 34041057,
    "eventCreationTimestamp": 1730113018058,
    "parentEventId": 34041056,
    "messageType": "file",
    "partnerName": "x12-24-10-28-SWR",
    "partnerNumber": "XLT4AS8ZQH45",
    "partnerFileType": "EDIX12",
    "direction": "OUTBOUND",
    "isErrorStatus": false,
    "isFinalStatus": true,
    "files": [
      {
        "eventType": "File Level Event",
        "eventStatus": "Complete",
        "eventId": 34041057,
        "eventCreationTimestamp": 1730113018058,
```

```

        "parentEventId": 34041056,
        "messageType": "file",
        "fileName":
"x12_810_034041057_34041057_2024_24_10_28_06_06_58_00_521_EDT.edi",
        "interchangeControlNumber": "034041057",
        "groupList": [
            {
                "eventType": "Group Level Event",
                "eventStatus": "Complete",
                "eventId": 34040759,
                "eventCreationTimestamp": 1730113252305,
                "parentEventId": 34041057,
                "messageType": "810",
                "transactionList": [
                    {
                        "eventType": "Transaction Level Event",
                        "eventStatus": "Complete",
                        "eventId": 34041153,
                        "eventCreationTimestamp": 1730113253246,
                        "parentEventId": 34041057,
                        "messageType": "810",
                        "number": "DO091003TESTINV01TAX",
                        "messageControlNumber": "0001",
                        "groupNumber": "34041057",
                        "isErrorStatus": false,
                        "isFinalStatus": true
                    },
                    {
                        "eventType": "Transaction Level Event",
                        "eventStatus": "Complete",
                        "eventId": 34041154,
                        "eventCreationTimestamp": 1730113253275,
                        "parentEventId": 34041057,
                        "messageType": "810",
                        "number": "DO091003TESTINV01TAX",
                        "messageControlNumber": "0002",
                        "groupNumber": "34041057",
                        "isErrorStatus": false,
                        "isFinalStatus": true
                    }
                ],
                "groupControlNumber": "34041057",
                "isErrorStatus": false,
                "isFinalStatus": true
            }
        ],
        "isErrorStatus": false,
        "isFinalStatus": true
    }
}
]

```

## CHAPTER 11

# Glossary

**event**

An occurrence of a at each stage of processing. The B2B Gateway server generates the event and updates the event status while it processes the .

**inbound flow**

A B2B Gateway inbound flow receives and processes messages that a partner sends to the organization.

**interface file**

When you receive EDI messages from partners, pre-packaged processing mappings validate the inbound EDI messages and convert them to XML interface files, one file for each message type.

**mapping**

A mapping that processes a data set. The mapping includes the data sources and targets, metadata folders, and connections to process the data.

**outbound flow**

A B2B Gateway outbound flow creates and sends messages from the organization to the partner.

**partner**

An external or internal entity that sends documents for processing or receives documents after processing in B2B Gateway. A partner can be an organization such as a vendor or customer or an internal system such as an accounting system or an ERP system.

**repository**

A relational database table set that contains the metadata required to process files in B2B Gateway. It also contains the events that B2B Gateway generates while it processes files.



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