



IBM Software Group

IBM WebSphere® Data Interchange V3.3

Trading Partner Setup



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This presentation will review Trading Partner Setup.

Goals

- Review the Trading Partner Profile
- Discuss how trading partners are determined
- Reference



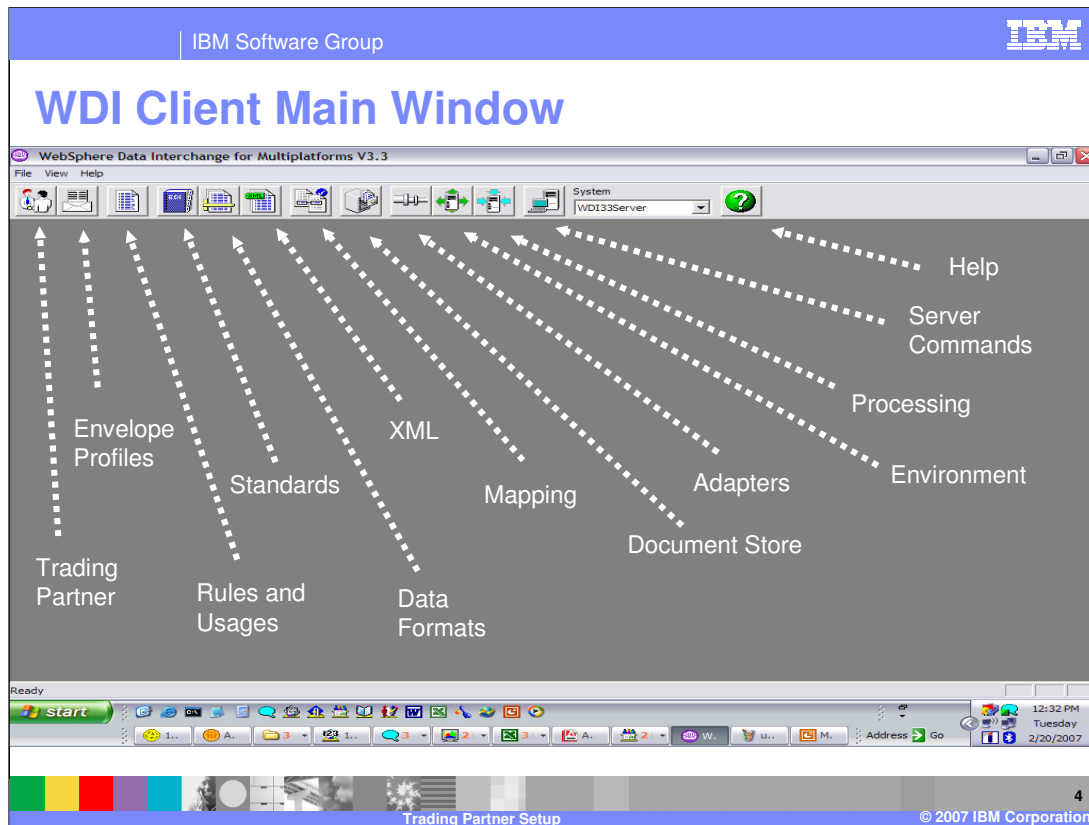
The presentation will review the WebSphere Data Interchange (WDI) trading partner profile and discuss how trading partners are determined.

Trading Partner Profile

- Identify Trading Partner
 - ▶ Sending
 - ▶ Receiving
 - ▶ External
 - ▶ Internal

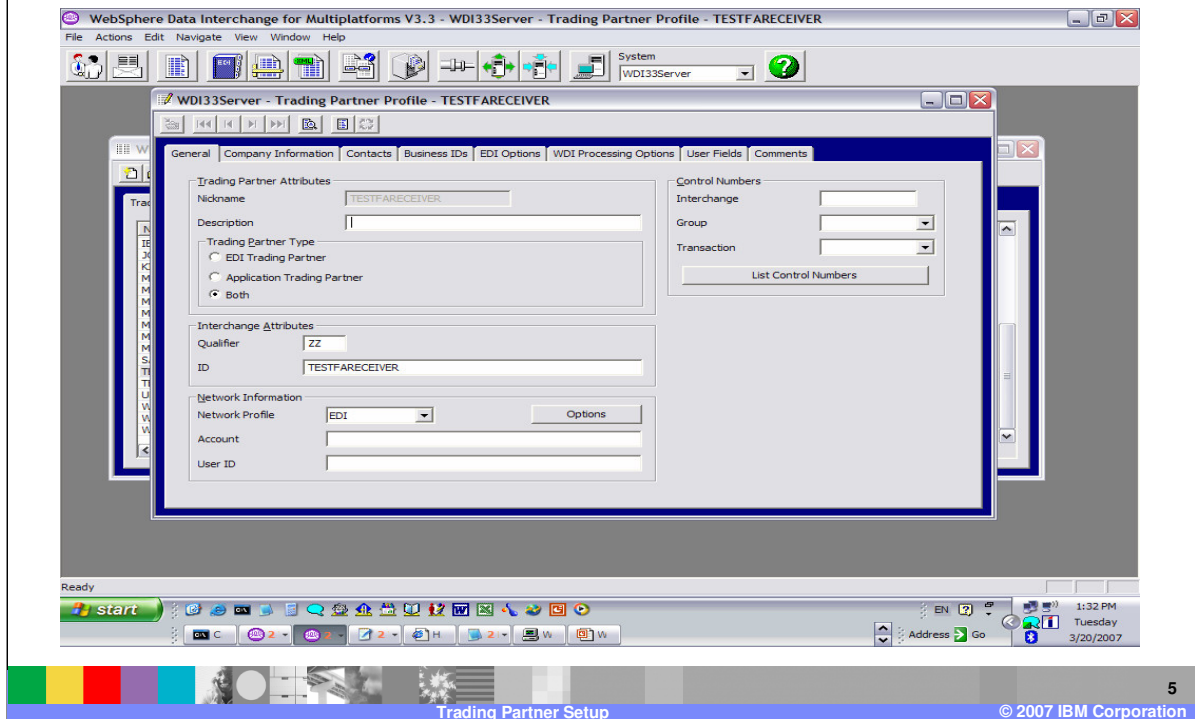


Whenever your organization begins exchanging documents with a new trading partner, you need to create a new Trading Partner profile. Trading Partner profiles identify your Trading Partners to WebSphere Data Interchange and specify the details of how to exchange documents with each trading partner. Generally, documents need to be associated with a sending trading partner and a receiving trading partner. The sending trading partner is the trading partner that creates a document. The receiving trading partner is the trading partner to which the document is destined. A trading partner can be an entity external to your business, such as another company or group within another company. A trading partner can also be an internal entity, such as a department or group within your company. Trading partners are described to WebSphere Data Interchange using a Trading Partner profile. Trading Partner profiles permit WebSphere Data Interchange to maintain information about your company's Trading Partners and to define the essential features of your connections.



This is the main window of WDI Client. This is a standard Windows screen configuration with the addition of the WDI navigation bar. Trading Partner profiles are located in the Trading Partner functional area.

Trading Partner Profile

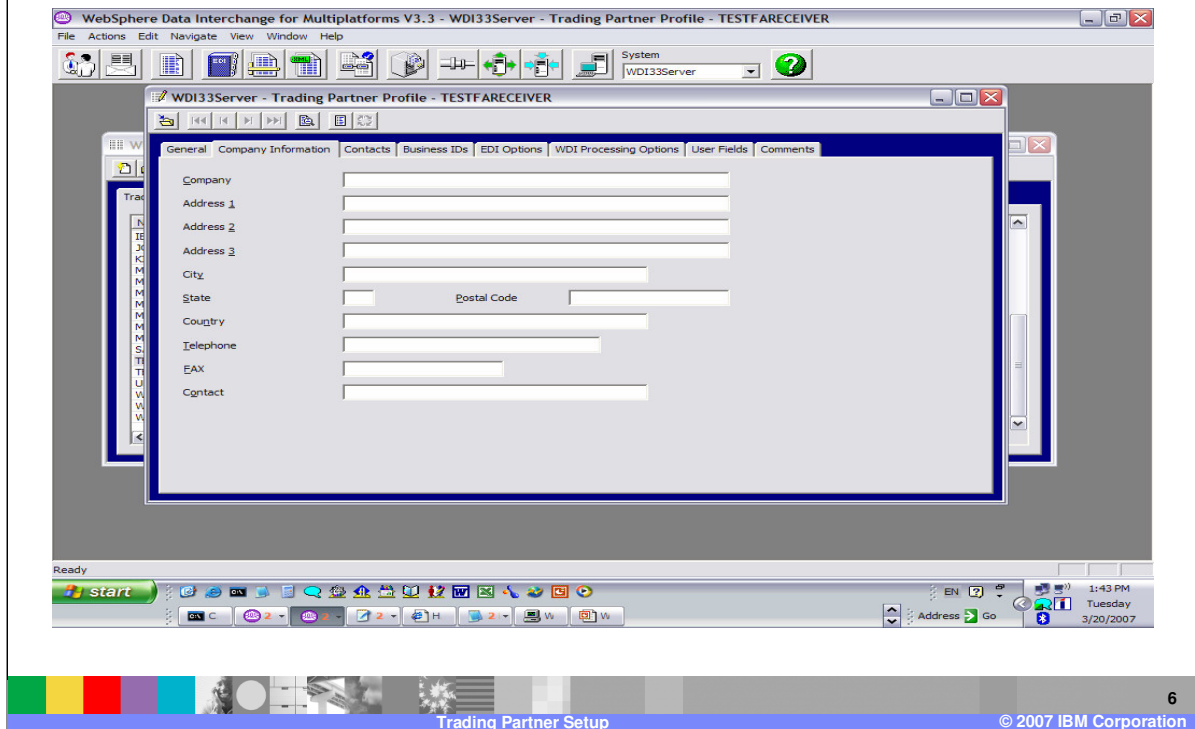


WebSphere Data Interchange Client maintains essential information on your Trading Partners through Trading Partner profiles. For example, the Trading Partner profile for a trading partner called *JB Smith & Company* would contain basic information such as company name, address, telephone number, and so on, as well as information used in translation, such as trading partner Nickname, Network ID, Account and User ID information, and Control Numbers. The Trading Partner profile editor contains eight tabs, each of which displays specific information about only the selected Trading Partner profile. The General tab contain information such as the trading partner type, Interchange values, network profile and control numbers.

An Electronic Data Interchange (EDI) trading partner type is a traditional WebSphere Data Interchange trading partner. A “spoke” trading partner or a trading partner “external” to the installation. An Application trading partner type represents an entity like a division within a company doing centralized translation, or a “hub” customer dealing with a group of “spoke” trading partners, or an “internal” trading partner.

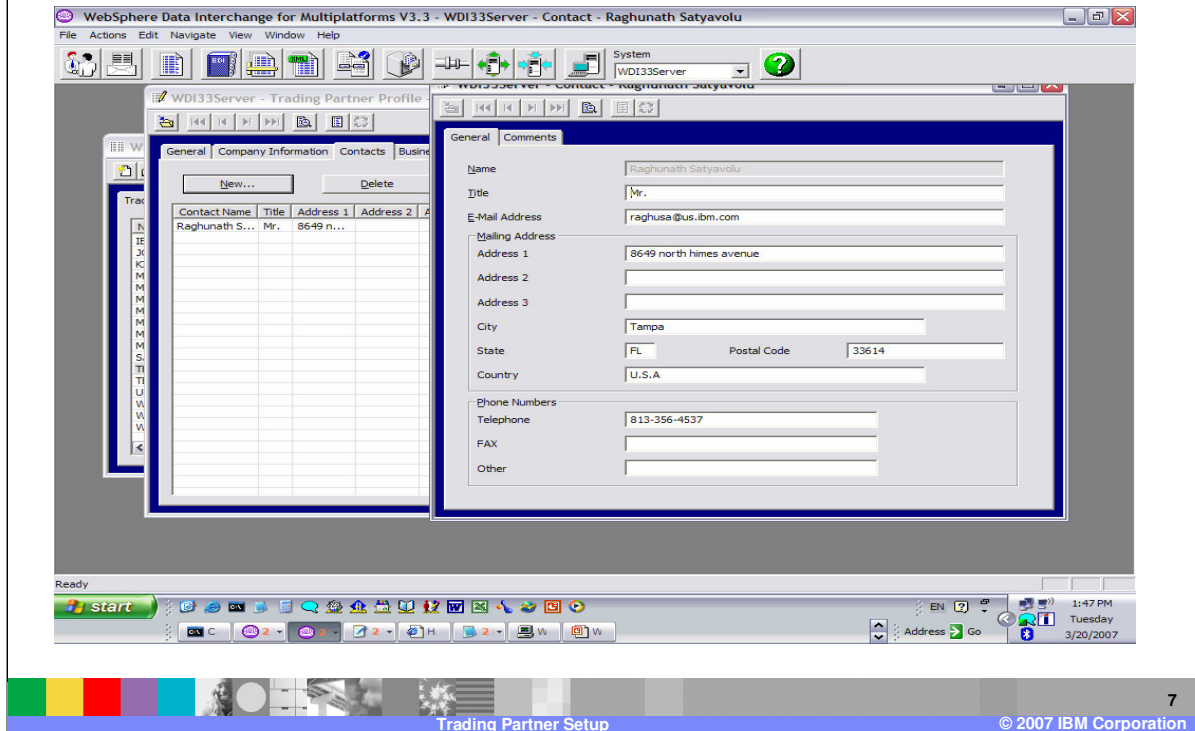
The Control Numbers fields contains the initial reference number for interchanges being sent by this trading partner.

Trading Partner Profile



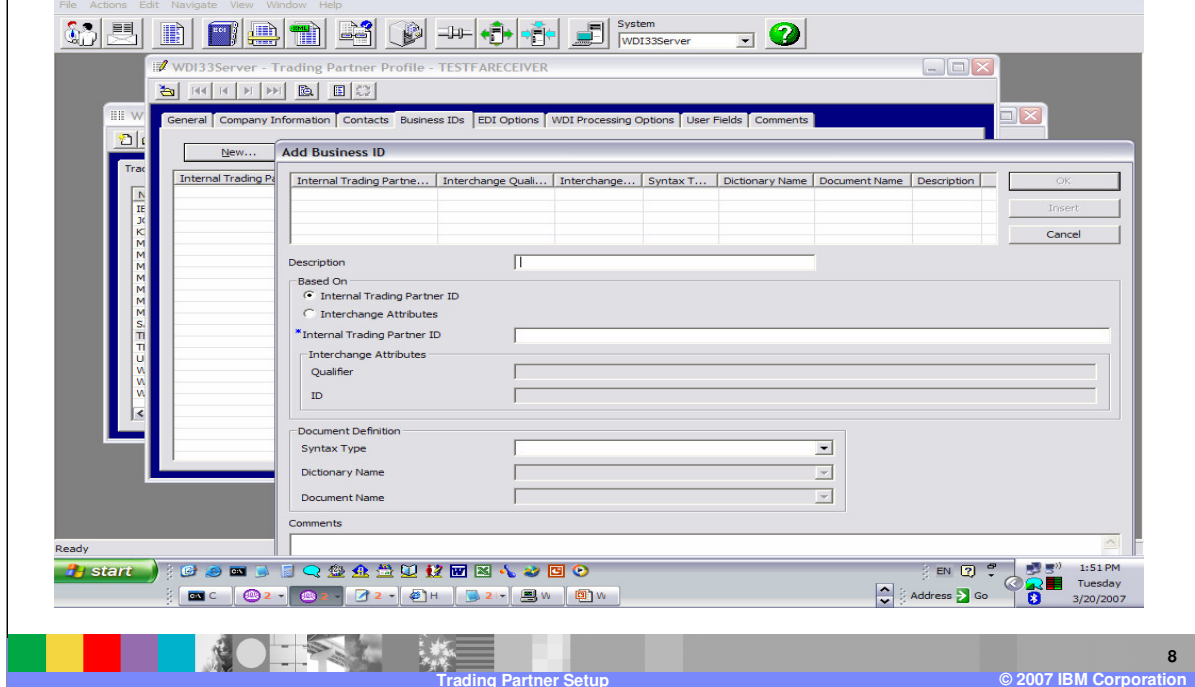
The Company Information tab of the Trading Partner editor holds address and phone information about the Trading Partner profile.

Trading Partner Profile



WebSphere Data Interchange Client uses Contacts to maintain information on the various contacts for your Trading Partners. For example, a contact can be the person who manages the business for a trading partner, an analyst at the trading partner's company, or a third-party administrator that manages operations on behalf of a trading partner.

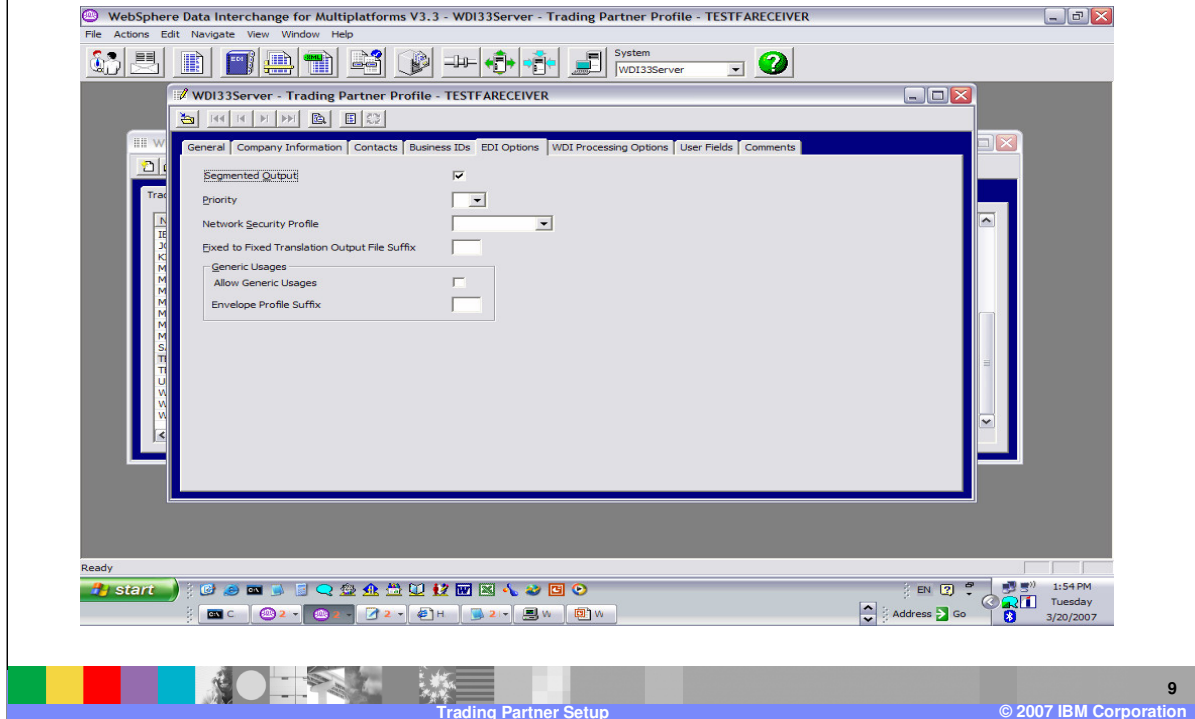
Trading Partner Profile



A business ID provides a mechanism to associate many internal trading partner IDs with a single Trading Partner profile. Many interchange qualifier and interchange IDs can also be associated with a single Trading Partner profile. Business IDs can also be specific to a document syntax type, a dictionary within a document syntax type, and even a specific document. This means that internal trading partner IDs and interchange qualifiers and interchange IDs can be actually be associated with many Trading Partner profiles. Business IDs must be unique based on the values of the internal trading partner ID, interchange qualifier, interchange ID, document syntax type, dictionary name, and document definition name fields. A business ID is based on either an internal trading partner ID or an interchange qualifier and interchange ID. When a Business ID is based on an interchange qualifier and interchange ID, both the interchange qualifier and interchange ID can be specified or just one of those values can be specified.

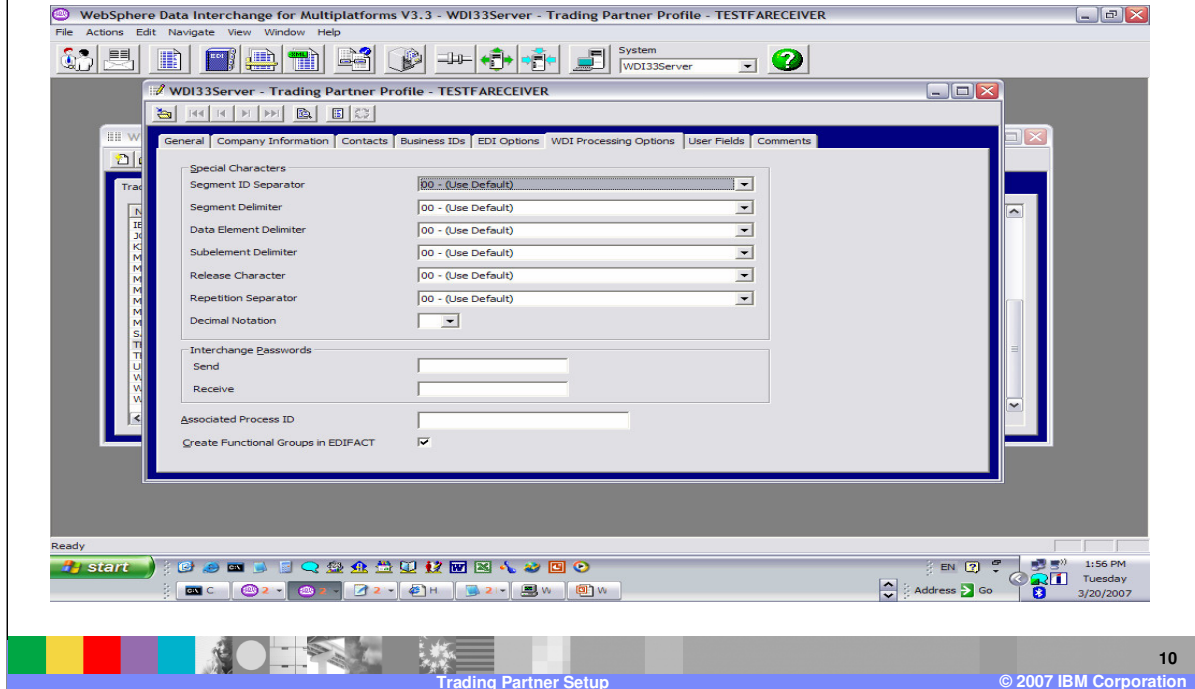
For EDI syntax, if the dictionary and document are specified with the Business ID entry, the DICTONARY and DOCUMENT PERFORM keywords must be used. This is because trading partner identification occurs at the Interchange level of the envelope using the Interchange Sender and Receiver IDs and Qualifiers. Unless the DICTONARY and DOCUMENT keywords are used, the dictionary and document are not identified at the interchange level. Instead, they are determined separately for each group or transaction, and there may be multiple dictionary and/or document types within an EDI interchange.

Trading Partner Profile



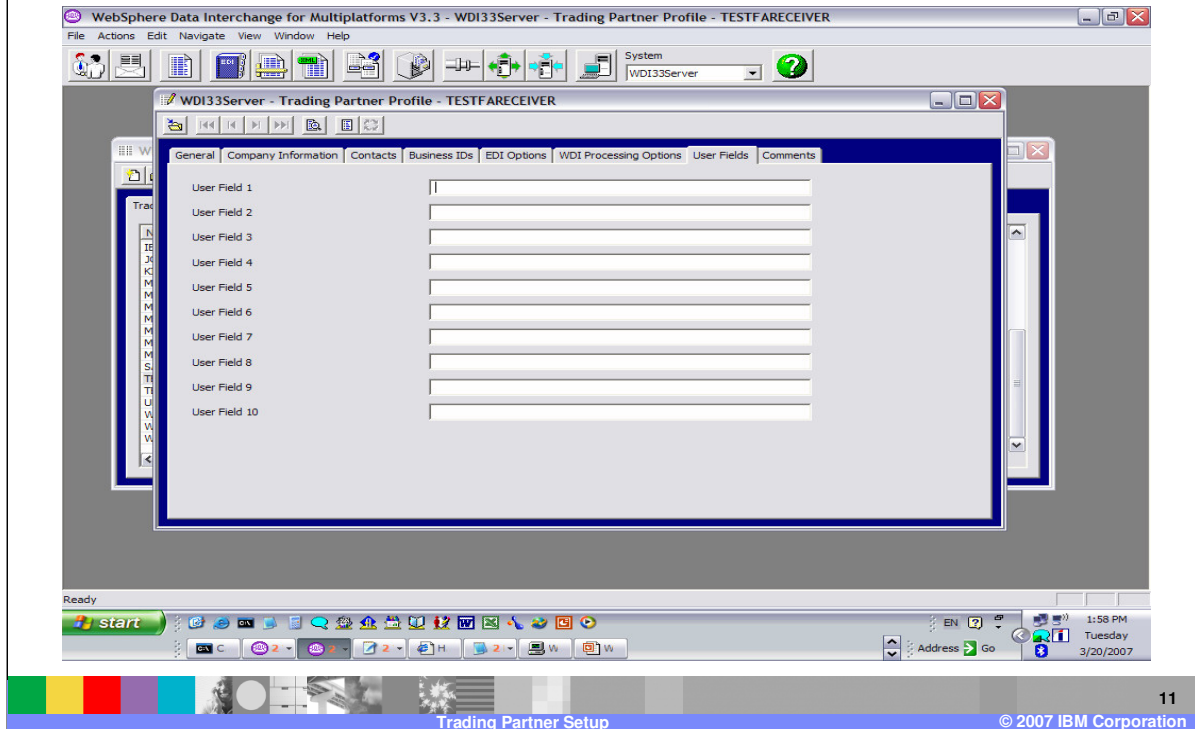
The EDI Options tab page of the Trading Partner profile editor holds translation processing options that, if present, will provide default values specific to this Trading Partner profile.

Trading Partner Profile



The Trading Partner profile WDI Processing Options tab holds WebSphere Data Interchange processing options that, if present, will provide default values specific to this Trading Partner profile. This is the location where a Trading Partner profile can be associated with a specific process. The term *process* refers to a collection of maps to be used to interact with a set of Trading Partners. Such a set of maps is commonly referred to as a public process because it is a sequence of public (external to your company) document exchanges which implement some business process. Examples of such a business process are production purchasing or health care claim processing. The sequence of steps that take place inside your company to implement the business process are known as a private process. Processes in WebSphere Data Interchange can be either public or private processes.

Trading Partner Profile



The User Fields tab of the trading partner editor is intended to provide an installation with custom fields in the Trading Partner profile that can be used any way the installation desires. The values in the user fields can be used in a data transformation map, validation map, and functional acknowledgement map. Use the sending Trading Partner profile properties and receiving Trading Partner profile properties associated with the user fields to obtain the user fields values in a map.

Section

Determining the Trading Partner



Determining the Trading Partner

- Receive Map Process
 - ▶ Multiple search for match in the **Account number** and **User ID** fields based on length of Interchange ID field
 - ▶ Match in the **Contact Phone** field
 - ▶ Match the **Interchange Qualifier** and **Interchange ID** fields



It is important to understand the search sequence used when an interchange is parsed to determine which trading partner is going to receive this interchange (during the send process), or which trading partner has sent this interchange (during the develope process). WebSphere Data Interchange uses these search steps to identify the trading partners. For receive maps, the sending trading partner identifies the external trading partner who is the sender of the document. The receiving trading partner identifies the internal trading partner who is the receiver of the document. Only trading partner profiles defined with a trading partner type of EDI trading partner or both can be used as a sending trading partner.

Determining the Trading Partner

- Send Map Process
 - ▶ Application or Sending trading partner identified in source data
 - ▶ Interchange ID and Qualifier identified in source data
 - search the Trading Partner profile members
 - ▶ If no match then unknown, ANY trading partner profile used
 - ▶ EDI trading partner identified in source data
 - ▶ Interchange ID and Qualifier identified in source data
 - search the Trading Partner profile members
 - ▶ If no match then unknown, ANY trading partner profile used



For send maps, the sending trading partner identifies the internal trading partner who is the sender of the document. The receiving trading partner identifies the external trading partner who is the receiver of the document. Only trading partner profiles defined with a trading partner type of application trading partner or both will be can be used as a sending trading partner. WebSphere Data Interchange uses these search steps to identify the trading partners.

Determining the Trading Partner

- Data Transformation Map Process
 - ▶ XML Source Sending trading partner
 - sender interchange ID and qualifier identified in the source data – search trading partner profile
 - ▶ XML Source Receiving trading partner
 - internal trading partner ID identified in the source data – search trading partner profile business Id.
 - receiver interchange ID and qualifier identified in the source data – search trading partner profile



For data transformation maps, the sending trading partner identifies the internal trading partner who is the sender of the document. The receiving trading partner identifies the external trading partner who is the receiver of the document. With XML source data the sending and receiving trading partners may be identified in the source data. The receiving trading partner may also be identified as an internal trading partner which will cause a search in the trading partner business IDs to determine the trading partner.

Determining the Trading Partner

- Data Transformation Map Process
 - ▶ Application Source Sending trading partner
 - Sending trading partner identified in the source data
 - sender interchange ID and qualifier identified in the source data – search trading partner profile
 - ▶ Application Source Receiving trading partner
 - Receiving trading partner identified in the source data
 - internal trading partner ID identified in the source data – search trading partner profile business Id.
 - receiver interchange ID and qualifier identified in the source data – search trading partner profile



With Application source data the sending and receiving trading partners may be identified in the source data. The receiving trading partner may also be identified as an internal trading partner which will cause a search in the trading partner business IDs to determine the trading partner.

Determining the Trading Partner

- Data Transformation Map Process
 - ▶ EDI Source Sending trading partner
 - sender interchange ID and qualifier identified in the source data – search trading partner profile
 - ▶ EDI Source Receiving trading partner
 - receiver interchange ID and qualifier identified in the source data – search trading partner profile



With EDI source data the sending and receiving trading partners are identified in the source data.

Determining the Trading Partner

- Data Transformation Map Process
 - ▶ XML and Application Target Sending trading partner
 - Sender interchange ID and qualifier
 - internal trading partner ID
 - ▶ XML and Application Target Receiving trading partner
 - Receiver interchange ID and qualifier



The process for setting the trading partner identification fields for XML and Application target documents are from the Sending and receiving trading partners.

Determining the Trading Partner

- Data Transformation Map Process
 - ▶ EDI Target Sending trading partner
 - Sender interchange ID and qualifier
 - ▶ EDI Target Receiving trading partner
 - Receiver interchange ID and qualifier
 - ▶ Mapping overrides
 - ▶ Envelope Profile overrides



The process for setting the trading partner identification fields for EDI target documents are from the Sending and receiving trading partners. These values can have overrides from the mapping properties and envelope profile.

Reference

- More information can be found in WDI V3.3 User's Guide



More information can be found in the WebSphere Data Interchange version 3.3 User's guide.

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