

IBM Sterling Gentran:Viewpoint for z/OS

# User Guide

Release 6.6



This edition applies to the 6.6 Version of IBM® Sterling Gentrans:Viewpoint® for z/OS® and to all subsequent releases and modifications until otherwise indicated in new editions.

Before using this information and the product it supports, read the information in Notices on page N-1.

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# Product Description

This chapter provides an introduction to IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6, including features and benefits, concepts and terminology, and system architecture and operation.

Chapter One is organized into five sections:

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## Executive Overview

Many companies may have found the initial impact of introducing EDI into their business systems to be complex—increases in staff, time, and paper. The opportunities for more accurate information, faster turnaround, and reduction in errors are still there. You simply need a way to manage the process.

Sterling Gentran:Viewpoint not only addresses these challenges, but also provides the tools necessary to fully exploit the opportunities.

Sterling Gentran:Viewpoint is an advanced set of tools that will help you automate the monitoring, control, and management of your EDI environment. Specifically, it allows you to more efficiently manage your day-to-day EDI operations and continuously increase your number of trading partners, messages, and applications. Improved access to critical information can enhance customer service and internal communications.

The primary objective of Sterling Gentran:Viewpoint is to make the right information, about events which have occurred in EDI business operations, available to the right people at the right time. Sterling Gentran:Viewpoint accomplishes this objective with two major capabilities:

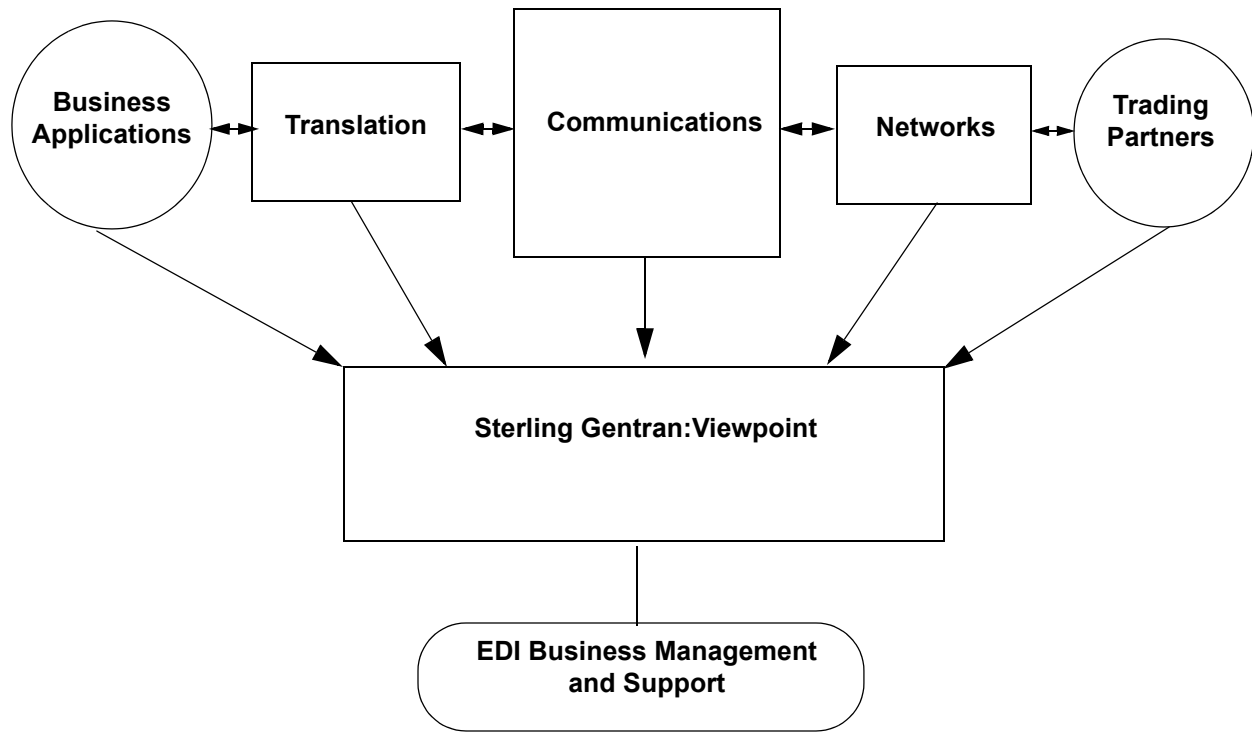
- Exception Management
- Tracking Management

Exception Management is a part of the base Sterling Gentran:Viewpoint product. It allows you to capture exception information, notify the appropriate users, and optionally take automated action for exceptions that are specific to their EDI business needs. An example of Exception Management is to capture outbound invoice errors, make the information available online for the appropriate payables people, and automatically send an e-mail to inform them that the exception has occurred.

Tracking Management is an optional module for Sterling Gentran:Viewpoint that allows you to query the status and history of a document as it moves through the entire end-to-end EDI environment. The user has the ability to query based on identifiers that they know and understand. An example of Tracking Management is a customer calling to inquire about their purchase order. Using the PO Number, the service person can determine online that the document was received but has failed compliance checking, and that the rejected acknowledgement was sent out to the customer.

The context of Sterling Gentran:Viewpoint within your environment is illustrated in Figure 1.1. Any System/Process (Tracking Point) that has been set up to communicate with the Sterling Gentran:Viewpoint system can pass information to be monitored by Sterling Gentran:Viewpoint. The Exception Management capabilities focus on IBM® Sterling Gentran:Basic® for z/OS® processes that are a part of the “Translation” box and Sterling Connect processes that are a part of the “Communications” box for IBM® Sterling Gentran:Plus® for z/OS® installations. Also, the Network Reconciliation and Acknowledgment Reconciliation provide information from the “Networks” and “Trading Partners” boxes. With Tracking Management, you are able to track items in the “Business Applications” and “Communications” boxes by using User Gateways into Sterling Gentran:Viewpoint.





**Figure 1.1 Sterling Gentran:Viewpoint Context**

Users of Sterling Gentran:Viewpoint can realize many benefits:

- Reduced operating costs resulting from automated business processes and faster provision of information
- Reduced business risks through better controls, tracking, and auditing
- Improved quality of EDI processing through the use of better EDI management tools

Your business can quickly gain tangible benefits using Sterling Gentran:Viewpoint. Some of the benefits are described below.

**Reduced operating costs through increased automation and greater efficiency**

- Less people time
- Fewer paper reports
- Faster information
- Faster operation

**Reduced business risk through advanced controls, tracking, and auditing**

- Business/application-oriented detection of exceptions
- User-defined Exception Capture and Notification
- User-defined concise, understandable resolution information
- End-to-end business process tracking

**Higher service levels - Quality**

- Responses to customers can be greatly enhanced.
- Business users can easily access the information they require.
- Problem notification is distributed to the right users with the right information.
- Automated actions may be defined for responding to exceptions.

Sterling Gentran:Viewpoint combines with the strength and experience of the Sterling Gentran:Basic and Sterling Connect product families to provide a powerful EDI management tool.

## Feature Summary

Key features of Sterling Gentran:Viewpoint are summarized in this section. Features are described within the following categories:

- System-Wide Features
- System Management
- Exception Management
- Tracking Management (optional module)

**Note:** Exception Management is included with the basic Sterling Gentran:Viewpoint product; Tracking Management is an optional feature to the Sterling Gentran:Viewpoint product.

### System-Wide Features

The following are global features of Sterling Gentran:Viewpoint.

#### **Online Facility - Real-Time System Access**

Sterling Gentran:Viewpoint provides user-friendly online capabilities, which enable you to quickly and easily perform all setup and operational functions. The online system is a seamless integration with the Sterling Gentran:Basic and IBM® Sterling Gentran:Realtime® online systems.

#### **Integrated Security**

All security features of Sterling Gentran:Viewpoint are completely integrated with the existing Sterling Gentran:Basic security system. This means one-time setup for the control and management of access to the entire EDI environment.

#### **Comprehensive User Documentation**

Complete user documentation is provided, which addresses both the technical and business user.

#### **User-defined Online Maintenance and Inquiry Criteria**

Maintenance and inquiry options that are required may be set up from the Sterling Gentran:Viewpoint Online Facility. This option provides powerful selection capabilities.

Sets of selection criteria can be saved and reused. This eliminates the need to manage batch control parameters and simplifies setting up maintenance and inquiry requests.

#### **"Prompt" Feature**

You can enter options quickly and accurately using selection lists provided by the prompt feature.

#### **Full Online Help**

Screen-level and field-level (context sensitive) help is provided for all screens and fields.

#### **CUA Compliant**

The Online Facility complies with current guidelines for Common User Access (CUA).

#### **Action lists**

Action lists simplify the use of the online functions and provide for quick screen navigation.

**Trading Profile Compatibility**

Sterling Gentran:Viewpoint allows for the use of existing and new Sterling Gentran:Basic Trading Profile information in your exception capture set up. This means no duplication of Trading Profile information is necessary.

**System Image Feature**

The system image feature allows multiple Sterling Gentran:Viewpoint Images to run concurrently in the same CICS region. Each system image has its own set of data sets, and operates independently of any other Sterling Gentran:Viewpoint image. Refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Installation Guide* “Appendix B” for more information.

**Program Image Feature**

The program image feature allows the first three characters of all CICS program IDs to be user defined. It allows different system images of Sterling Gentran:Viewpoint, on different releases of Sterling Gentran:Viewpoint software, to be run in the same CICS region. Refer to *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Installation Guide* “Appendix B” for more information.

**System Management**

Sterling Gentran:Viewpoint provides online real-time control and management of all of its functions.

**Flexible/Dynamic System Configuration**

Extended System Management allows you to configure your Extended EDI System online from the Sterling Gentran:Viewpoint system. Users are able to monitor as much or as little of their Extended EDI System as they wish.

**Dynamic System Operation**

From the System Options screen the entire Sterling Gentran:Viewpoint system, or selected portions of the system, may be dynamically deactivated or activated.

A built-in trace facility allows Sterling Gentran:Viewpoint background CICS tasks to be monitored.

An online Error User Exit may be invoked to respond to various system conditions.

**Powerful Maintenance and Inquiry Options**

Setup and management of system maintenance and reporting can be easily accomplished using the online Maintenance/Inquiry Options.

**Exception Management**

The Exception Management capabilities of Sterling Gentran:Viewpoint allow you to capture information, notify users, and take automated action for exceptions that are specific to your EDI business needs. Sterling Gentran:Viewpoint provides several components that allow you to effectively manage exceptions. The emphasis in Exception Management is to provide you with the ability to define the extent of Exception Management you require.

Exception Management features include:

- User-defined exceptions
- User-defined notification
- User-defined automated response

### **User-defined Exceptions**

An “exception,” within the context of Sterling Gentran:Viewpoint, is an event or series of events resulting from a process for which you want some action to be performed. For example, an event could be that a mapping error was encountered during creation of an outbound purchase order. The action to be performed could be that an end user, in order processing, is notified of the error and alerted with a procedure to follow. **An exception does not have to be an error.** For example, an exception could be defined that causes the Accounts Payable clerk to be notified when invoices are received.

Components for defining exceptions include:

#### **Flexible Exception Capture Definitions**

Online screens simplify the definition of exception events and the data relevant to the event to be captured. The definition can be as general or as specific as you choose to make it. For example, you may want to define exception control in a general manner for all mapping errors and define additional detailed control for a specific system error message.

#### **Flexible User Messaging**

The Sterling Gentran:Viewpoint system provides the ability to attach user-written messages, and user-written procedures to an exception. This information is then available through exception inquiry screens, which aid in the resolution of the exception.

#### **Event-driven Exception Capture**

The Sterling Gentran:Viewpoint system provides the ability to capture exceptions in an event driven manner. Specifically, exceptions are only captured if a particular event or series of events has occurred. This can greatly reduce the amount of time required to resolve those critical problems that may impact business success.

#### **Multiple Exception Capture Levels**

Sterling Gentran:Viewpoint allows for exception capture, and therefore Exception Management, at various levels including System (for example, Sterling Gentran:Basic and Sterling Connect), Process (for example, Inbound Mapping and Mailbox), Trading Partner, Item (for example, batch, document, transaction, functional group, or interchange), or an Event (for example, acknowledgement status, document status, or envelope status).

### **User-defined Notification**

Once an exception has been captured, the appropriate people need to be notified to resolve it. The following features are included within User-defined Notification:

#### **User-controlled Distribution**

The user can control who is responsible for an exception through the use of exception profiles and online screens. These distribution capabilities include:

- Definition of exception recipients

- Transfer of exceptions to other recipients
- Attachment of review notes to an exception
- Closing of an exception

### **Individual, Multiple, and Group Recipients**

The Sterling Gentran:Viewpoint system provides the flexibility to define one or more users as the recipients of an exception, or to define a group to be the recipient. This flexibility allows almost any operational setup to be accommodated.

### **User-defined Order of Exception Presentation**

Sterling Gentran:Viewpoint allows the user to specify the order in which exceptions are displayed. For example, a user can specify that all documents processed by the Inbound Mapper are to be ordered by application and partner.

### **Powerful Inquiry Capabilities**

Exception Inquiry provides powerful capabilities to view and manage data and information that has been captured as specified by exception definitions. Inquiry capabilities include:

- Summary lists at the recipient and exception levels
- Lists of system messages at the exception level
- Display of system messages in the document data to put the exception in context
- Display of user written messages and procedures to aid in the resolution of an exception

### **User-defined Automated Response**

Sterling Gentran:Viewpoint provides the ability to initiate automated responses for a captured exception. This response, or Exception Action, is associated with an exception definition and enables the user to achieve a high level of unattended operation.

User Defined Automated Response includes the following features:

#### **Immediate Real-time Action**

Exception actions allow a user to be alerted immediately, via any system they have available in their environment (for example, E-mail, an auto-ops system)

#### **Interfaces to Batch and Online User Applications**

Both batch and online user applications can be automatically invoked to take action for an exception.

#### **Flexible Control of Data Passed**

The Sterling Gentran:Viewpoint system allows for both control and status data captured through exception definitions and user-defined data to be passed to the automated response application.

### **User defined Triggers**

The automated response associated with an exception can be triggered at various levels of processing. An exception action can be initiated once at the end of processing or for each item that incurs an exception during processing.

## Tracking Management

Whereas Exception Management provides information on exceptions occurring with documents moving through the EDI system, Tracking Management provides information on the status and history of documents (items) moving through the entire end-to-end EDI environment.

The Tracking Management module is an optional add-on capability for the Sterling Gentran:Viewpoint product and requires the base Sterling Gentran:Viewpoint system to be installed.

The emphasis of Tracking Management is twofold:

- Allow you to interface your online and batch applications with Sterling Gentran:Viewpoint. These Gateways, or APIs, provide the ability to track or obtain history for any item across the entire end-to-end EDI environment.
- Provide a query-based dialog so that you can locate items travelling through their extended EDI system. This dialog provides process history and detailed information for the item.

Tracking Management features include:

- User gateways (APIs)
- Trace ID
- Tracking user exit
- Basic queries
- Extended search conditions
- Query save/reuse, update and delete
- Search limit/find limit
- Process history
- Process detail
- Item messages display
- Item data display

### **User Gateways (APIs)**

User Gateways, or APIs, are provided for both online and batch user applications. These APIs allow you to connect your applications to the extended EDI environment for end-to-end monitoring of all EDI traffic.

### **Trace ID**

Tracking Management assigns and manages a Trace ID for items being tracked by Sterling Gentran:Viewpoint. The Trace ID provides a link for an item between processes and also provides a means for you to reference the item.



### **Tracking User Exit**

A Tracking User Exit can optionally be invoked when an item has been processed for a tracking point. This feature allows you to populate your own database for subsequent inquiry.

### **Basic Queries**

Basic Queries provide the ability to make simple queries against stored Tracking Information using preset criteria. Available criteria for a basic query are Item Type, Reference, Partner, and Date/Time.

### **Extended Search Conditions**

For queries that cannot be performed using the basic query criteria, this feature allows you to extend the search condition up to a 7-expression condition with full Boolean logic and AND/OR connectors.

### **Query Save/Reuse, Update and Delete**

For queries that are repeated frequently, you may save, reuse, and delete queries that you set up.

### **Search Limit/Find Limit**

For queries that involve a lengthy search, you can limit the number of items that Tracking Management evaluates. Similarly, the query request can be limited to a user-specified number of items found that meet the criteria.

### **Process History**

Process History provides you with a view of all processes that an item has been processed by and the status issued by each of those processes for the item.

### **Process Detail**

Detailed information related to an item for a specific process is provided by Process Detail. Some of the details included are: whether exceptions have been captured for the item, the Application, Network, User, Partner, and other information that may be helpful in taking further action.

### **Item Messages Display**

All messages issued for the item are listed by the Item Message display. This function is available for Sterling Gentran:Basic, Sterling Connect, and User processes. From this list, for Sterling Gentran:Basic processes, you can select a message for Data Display. This causes all messages to be inserted into the data for the item and you will be positioned in the data at the selected message.

### **Item Data Display**

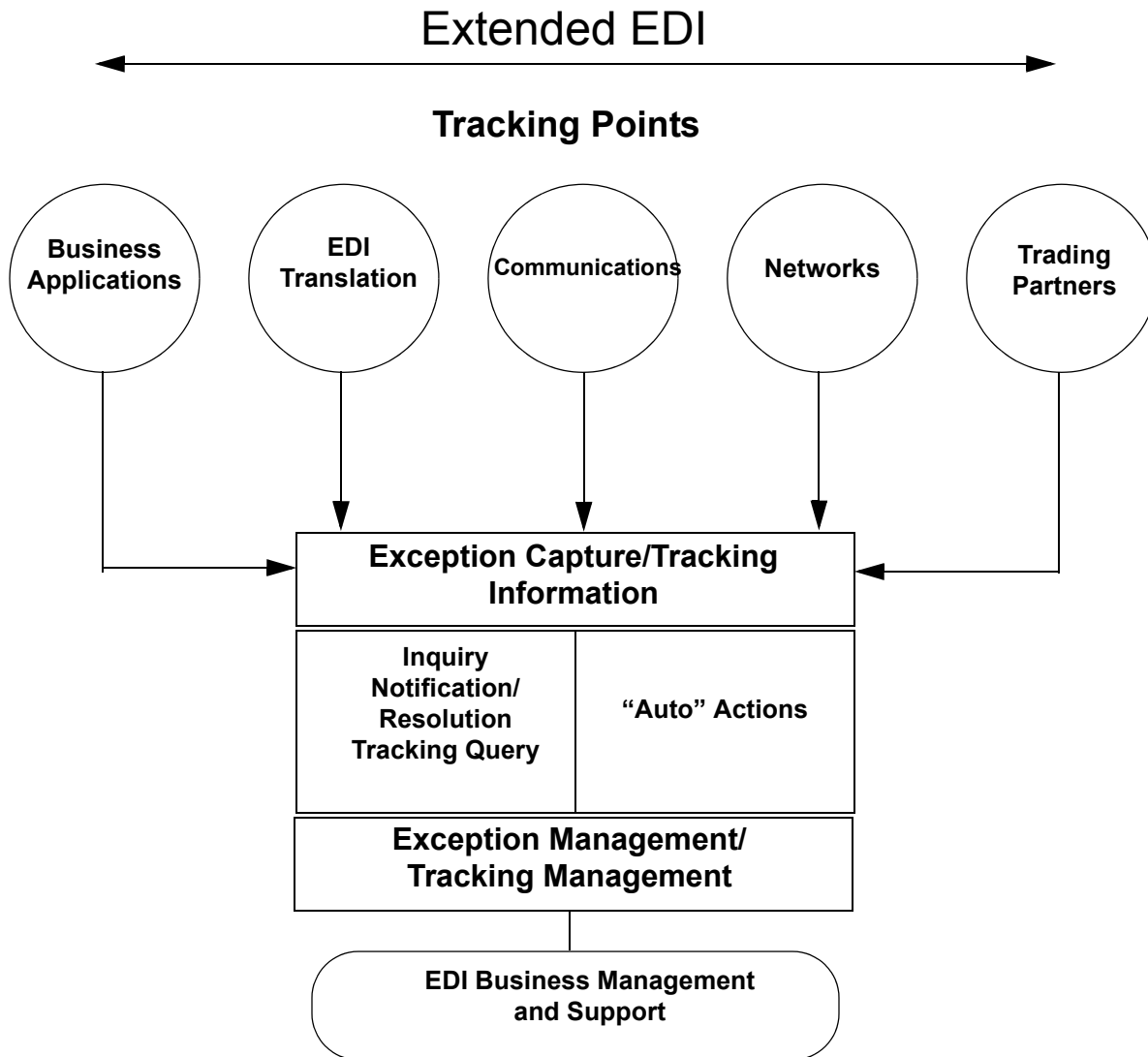
For Sterling Gentran:Basic data items, the Item Data Display screen displays the data and all messages for the item. This function applies to data residing on the Sterling Gentran Databank Message Store files.

For Sterling Gentran:Plus<sup>®</sup> users, Sterling Connect data items are displayed by the Interchange Detail screen. This function applies to data residing on the Sterling Connect data queues.

## Concepts and Terminology

The fundamental concepts and terminology of Sterling Gentran:Viewpoint are introduced in this section. For an explanation of specific terms used by Sterling Gentran:Viewpoint, refer to the Glossary.

Figure 1.2 illustrates the basic concepts and terminology of Sterling Gentran:Viewpoint.



**Figure 1.2 Sterling Gentran:Viewpoint Concepts**

The following major concepts are described:

- Extended EDI system
- Exception Management
- Tracking Management

### Extended EDI System

Sterling Gentran:Viewpoint introduces a concept in EDI processing called the **Extended EDI System**. The Extended EDI System encompasses all systems between your EDI-enabled applications and your partner's EDI-enabled applications (End-To-End).

The primary component of the Extended EDI System is the **Tracking Point**. A Tracking Point is a system/process that has been defined to Sterling Gentran:Viewpoint. The Tracking Points, which are defined in Extended System Management, form your Extended EDI System. Tracking points, currently enabled for use with Sterling Gentran:Viewpoint Exception Management, are the Sterling Gentran:Basic and Sterling Gentran:Realtime (if installed) translation processes (for example, Inbound Editor, Inbound Mapper, Network Reconciliation), and the Sterling Connect processes (STOUTL) for Sterling Gentran:Plus installations. These same tracking points are also enabled for use with Sterling Gentran:Viewpoint Tracking Management. In addition, as long as the application has the ability to call the Sterling Gentran:Viewpoint gateway, any batch or online application can be enabled for Tracking Management.

Sterling Gentran:Viewpoint provides monitoring of all Tracking Points (Systems) that are defined to the Extended EDI System. Figure 1.2 shows how Tracking Points relate to the Extended EDI System.

Sterling Gentran:Viewpoint provides the **Extended System Management** functions to define and manage the Extended EDI System for your environment. From the Extended System Definition, you are able to optimize your Extended EDI System configuration.

Major components, which could affect a business document traveling through the Extended EDI System, are defined in this functional area. Major components in the Extended EDI System are considered to be User Applications, EDI Translation Software, Communications, Networks, and Trading Partners. This does not exclude the addition of other components to the Extended EDI System, such as encryption or decryption.

### Exception Management

The concept of Exception Management revolves around providing you with the ability to define which events (exceptions) in the Extended EDI System are relevant. You then need the ability to distribute and resolve these exceptions.

Sterling Gentran:Viewpoint Exception Management provides automatic Exception Capture, Notification, and Action for exceptions you have defined in your Extended EDI System. From this functional area, you build Exception Profiles to automate the management of your exceptions.

Exception Management capabilities are accomplished using the following functions and options:

#### **Exception Profiles**

An Exception Profile is a set of criteria you have defined to Sterling Gentran:Viewpoint for managing an exception. The Exception Profile provides the instructions needed to **Capture** an exception, provide the appropriate **Notification** for an exception, and initiate the correct **Action** for an exception.

#### **Exception Capture Definitions**

This function is used to define the exceptions you want captured.

### **Recipient Notification**

This option is used to define who should be notified about an exception that has been captured.

### **Exception Action Definitions**

The Exception Action function allows you to define automated actions that can be initiated in response to an exception.

## **Tracking Management**

Tracking Management provides the ability for you to track an item (for example, a document) as it travels through the extended EDI system. You can query the status and history of an item using a variety of criteria, including identifiers that are known to you (that is, user references).

The focus of Tracking Management is on determining the current status or history of an item, whereas the emphasis of Exception Management is on automatic detection, notification, and resolution of exceptions or events that are relevant to you, and as they occur. The table on the following page lists the attributes of these two functional areas.

Tracking Management capabilities are accomplished using the following functions and options:

### **Tracking Points**

Tracking Points are processes enabled for Sterling Gentran:Viewpoint. You can define Sterling Gentran:Basic, Sterling Connect, or User tracking points. Sterling Gentran:Basic and Sterling Gentran:Realtime (if installed) translation processes are enabled to allow tracking of items as they are processed. These processes include the Mappers, Editors, Databank Extracts, and Network and Acknowledgement Reconciliation.

For Sterling Gentran:Plus users, the Sterling Connect processes, Offline Utilities (STOUTL), and Sterling Connect Outbound and Inbound Interfaces are enabled for tracking communication batch items.

In addition, you have the ability to define user tracking points, such as their application or communication systems. In this case, the application must be able to invoke a user gateway to pass information to Sterling Gentran:Viewpoint.

**Note:** User Tracking Points are only available with Tracking Management.

### **User Gateways**

User Gateways are programming interfaces (APIs) that can be used to pass tracking information to Sterling Gentran:Viewpoint from your application. Both batch and online user gateways are provided. User Gateways allow complete end-to-end tracking of items.

### **Tracking Management Query**

When the status information is stored in Sterling Gentran:Viewpoint, you have the ability to search or query on the status or history of an item by using the Tracking Management Query dialog. Both basic and extended queries can be performed, and queries can be saved and reused for frequent inquiries.

## Comparing/Contrasting Exception and Tracking Management

The following table summarizes Exception Management and Tracking Management.

<b>Exception Management</b>	<b>Tracking Management</b>
Problem Detection	Business Process Tracking
Resolution (user defined)	Document Status
Current View	Past and Present View
Automated Responses	Extensive Query Capability
IBM Processes	Any Processes

## System Architecture

This section provides a brief description of the major components of Sterling Gentran:Viewpoint. Figure 1.3 illustrates each of the major components and their relationships.

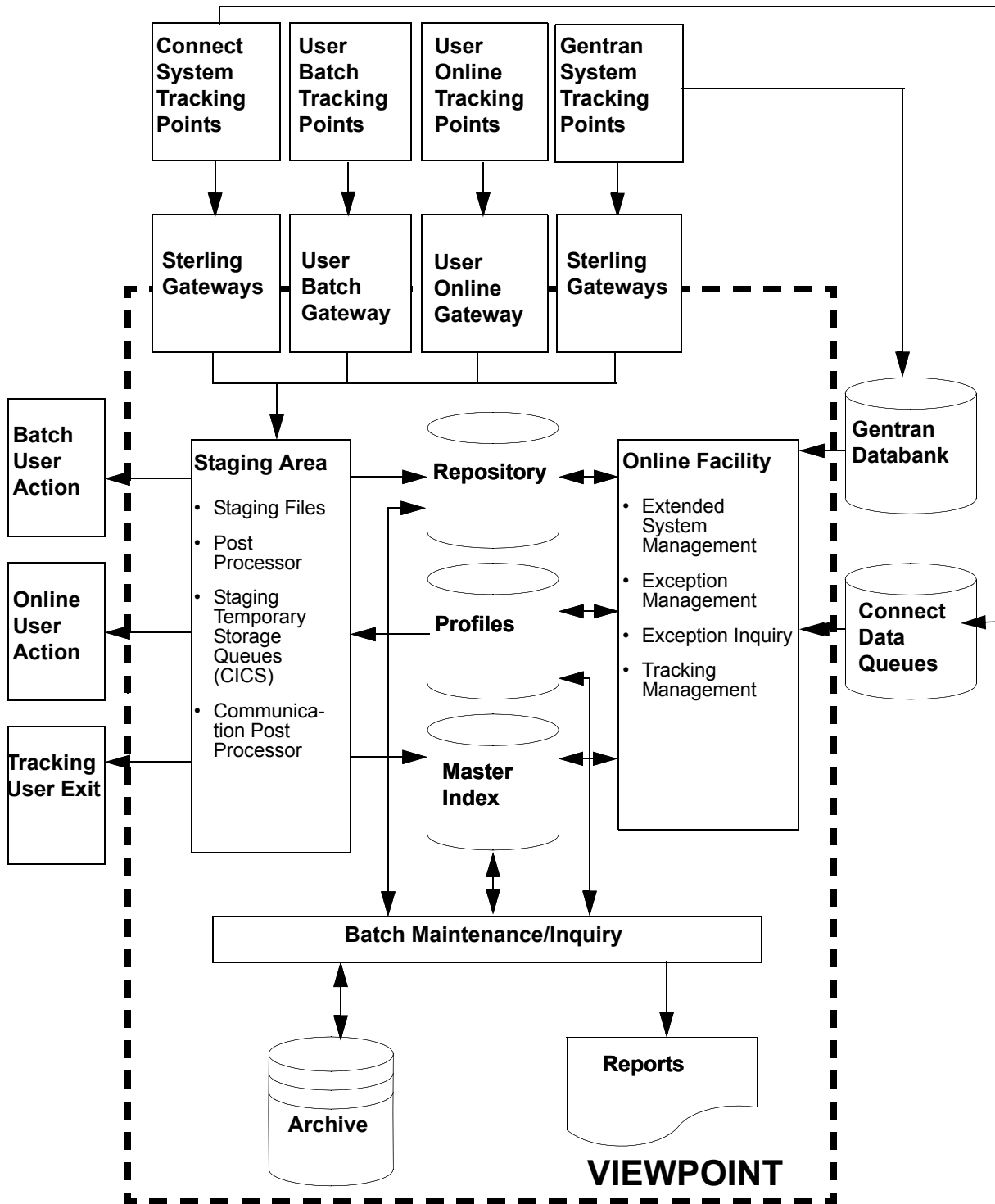


Figure 1.3 System Architecture

### Major Components

#### Tracking Points

Tracking points are processes in your Extended EDI System that are enabled for Sterling Gentran:Viewpoint. Sterling Gentran:Basic, Sterling Connect or User tracking points can be defined to pass data for Sterling Gentran:Viewpoint processing via the Sterling Gentran:Viewpoint Gateways.

#### Sterling Gentran:Viewpoint Gateways

Sterling Gentran:Viewpoint Gateways provide the ability to pass data (or information) to Sterling Gentran:Viewpoint that the user may wish to monitor. The data passing through Gateways is placed in the Sterling Gentran:Viewpoint Staging Area. The following gateways are provided:

Sterling Gateways	Sterling Batch and Online Gateways are called from Sterling Gentran:Basic and Sterling Connect system tracking points to pass both exception and tracking information to Sterling Gentran:Viewpoint.
User Batch Gateway	The User Batch Gateway passes Tracking Management information to Sterling Gentran:Viewpoint from user applications running in batch. The gateway is specific to the Tracking Management module, and cannot be used for Exception Management. Refer to the <i>IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide</i> , Chapter 4, “User Exits and APIs” for detailed information.
User Online Gateway	The User Online Gateway passes Tracking Management information to Sterling Gentran:Viewpoint from online user applications running under CICS. The gateway is currently specific to the Tracking Management module and cannot be used for Exception Management. Refer to the <i>IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide</i> , Chapter 4, “User Exits and APIs” for detailed information.

#### Staging Area

Data that is passed to Sterling Gentran:Viewpoint through Sterling Gentran:Viewpoint Gateways is processed through the Sterling Gentran:Viewpoint Staging Area. The actual data from the Gateways reside on one or more Staging Files or Staging Temporary Storage Queues.

The Sterling Gentran:Viewpoint Staging Area provides filtering of the data and reorganization of the filtered data into the Sterling Gentran:Viewpoint Repository and Master Index files. The Sterling Gentran:Viewpoint Staging Area Post Processor (a background online processor) is responsible for these functions.

For Sterling Gentran:Plus users, the Communications Post Processor (a background, online processor) formats the Sterling Connect communications information into a Staging TSQ to be processed by the Sterling Gentran:Viewpoint Post Processor. The Staging Area allows Sterling Gentran:Viewpoint to minimize its impact to the processing throughput of Tracking Points.

#### Sterling Gentran:Viewpoint Profiles

The Sterling Gentran:Viewpoint Profiles file stores all Sterling Gentran:Viewpoint definitions and profiles. Sterling Gentran:Viewpoint definitions and profiles are maintained by the user from the Online Facility Extended System Management, Exception Management, and Tracking

Management options. These definitions and profiles are used by the Staging Area to perform filtering and reorganization, as well as by the Online Facility to perform tracking queries. Maintaining definitions and profiles in the Sterling Gentran:Viewpoint Profile files may be performed from the Online Facility or from Batch. Inquiry reports may also be produced from Sterling Gentran:Viewpoint Profiles information.

### **Sterling Gentran:Viewpoint Repository**

The Sterling Gentran:Viewpoint Repository stores exceptions that have been captured, as well as tracking status and history information. End users, who are responsible for the management and control of business documents, manage the Repository information using the Online Exception Inquiry and Tracking Management Query functions. Maintaining data from the Sterling Gentran:Viewpoint Repository may be performed from the Online Facility or from batch. Inquiry reports may also be produced from Repository information.

### **Sterling Gentran:Viewpoint Master Index**

The Sterling Gentran:Viewpoint Master Index is used by the Tracking Management module to maintain the processing history for items being tracked. The primary purpose of the Master Index is to provide quick access to the data to show you the process history for an item. The Master Index also provides a link to exceptions that have been captured for an item.

### **Online Facility**

Sterling Gentran:Viewpoint Online Facility provides the tools you need to set up, control, and manage your EDI processing information. This includes Extended System Management, Exception Management, Exception Inquiry, and Tracking Management. The online facility is designed to work with both technical users and business users. For more information on Sterling Gentran:Viewpoint online facility, refer to Chapter 4, "Using the Online Facility".

### **Batch Inquiry**

Sterling Gentran:Viewpoint Inquiry processes provide inquiry reports. Inquiries can be made against Sterling Gentran:Viewpoint Profiles and Repository files. Parameters for controlling these processes are set up using the Maintenance/Inquiry options in Extended System Management of the Online Facility.

### **Batch Maintenance**

Sterling Gentran:Viewpoint Maintenance processes provide all the functionality necessary for maintaining Sterling Gentran:Viewpoint Profiles, Repository, and Master Index files. The Maintenance processes run in batch. Parameters for controlling these processes are set up using the Online Facility Maintenance/Inquiry Options function in Extended System Management. Options of Maintenance are to archive and restore data that has been purged.

### **User Actions**

A user action is a user batch procedure or an online transaction that you defined in Sterling Gentran:Viewpoint as an Exception Action. The User Action is automatically initiated by the Sterling Gentran:Viewpoint Post Processor when an exception has been captured.

### **Tracking User Exit**

A Tracking User Exit can be invoked by Tracking Management when an item has been processed for a tracking point. This feature allows you to pass information to your database for subsequent inquiry.



## System Operation

The following section describes the operational flow using the major components of Sterling Gentran:Viewpoint. Figure 1.4 illustrates general activities that are performed using Sterling Gentran:Viewpoint (both Exception Management and Tracking Management).

### Operational Activities

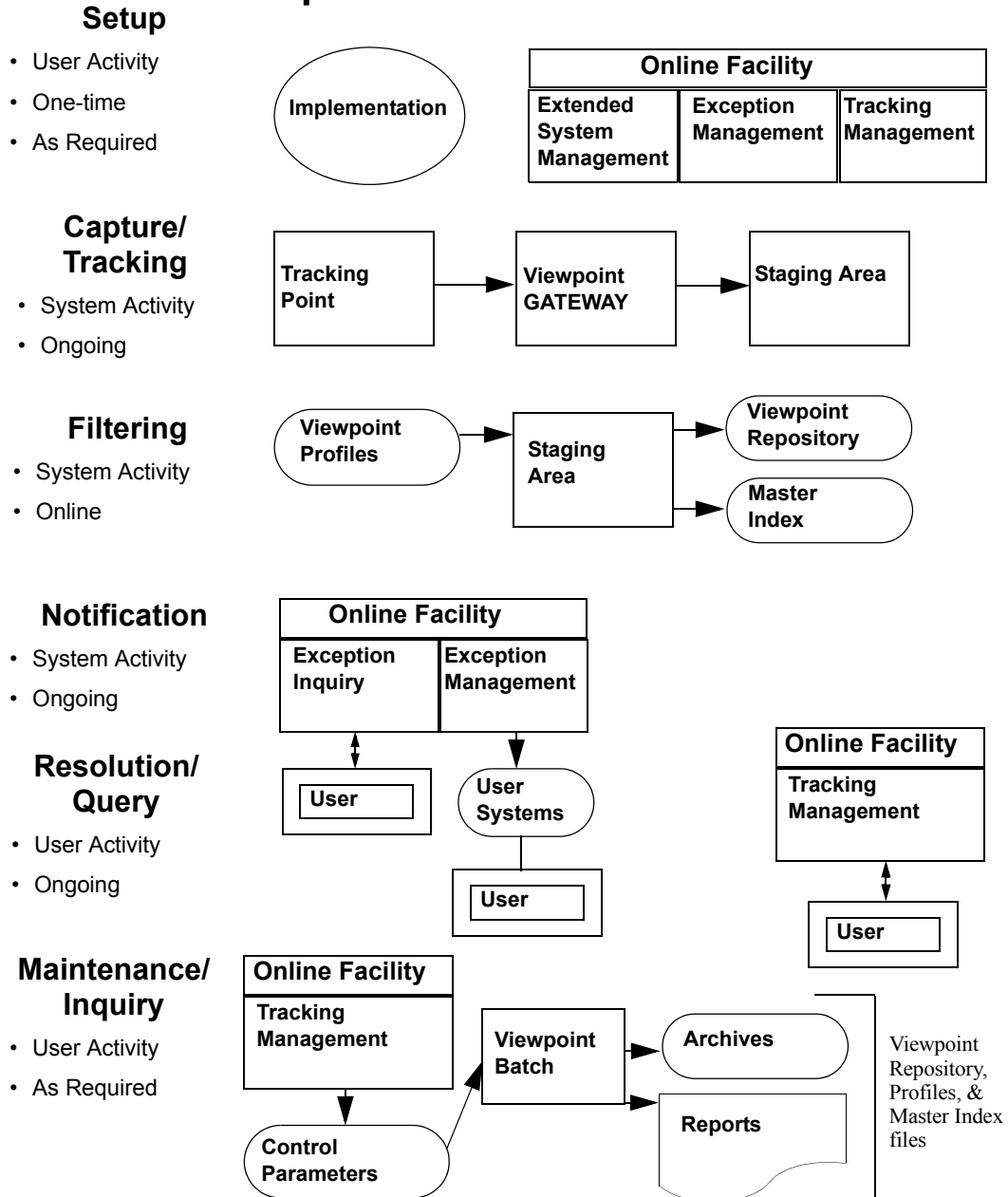


Figure 1.4 Operational Activity Flow

## Operational Activities

### Setup

Perform the Setup activity to configure Sterling Gentran:Viewpoint for your environment and information needs.

Sterling Gentran:Viewpoint provides three options in the Online Facility for performing this activity: Extended System Management, Exception Management, and Tracking Management. From the Online facility, define the systems and processes you wish to monitor. For Exception Management, define the information that is important to you and how you wish to be notified. For Tracking Management, define queries you wish to use repeatedly.

Perform this activity "one-time," and as required by changes in your environment or information needs. Refer to Chapter 5, "Screen Descriptions" for detailed information.

### Capture/Tracking

Capture and Tracking are system activities in which data/information being processed by Sterling Gentran:Viewpoint-enabled applications is passed through the Sterling Gentran:Viewpoint Gateways to Sterling Gentran:Viewpoint.

Sterling Gentran:Viewpoint confirms that the application is a valid Tracking Point and passes the received data/information to the Staging Area.

Sterling Gentran:Viewpoint performs this activity on an ongoing basis.

Refer to Chapter 5, "Screen Descriptions" for detailed information.

### Filtering

Filtering is a system activity that analyzes exception and tracking data/information received through the Sterling Gentran:Viewpoint Gateways. Using the Sterling Gentran:Viewpoint Profiles created in "Setup," Sterling Gentran:Viewpoint distributes the information to the appropriate people (for exceptions) and/or user systems (for exceptions or tracking information). For Tracking Management, the information is stored and is available for online query.

Sterling Gentran:Viewpoint performs this activity on an ongoing basis.

For more details, refer to "Exception Management Screens" in Chapter 5, "Screen Descriptions".

### Notification

Notification is the Exception Management system activity that builds resolution information and delivers that information to the right recipients and/or User "Auto Actions".

Sterling Gentran:Viewpoint performs this activity on an ongoing basis.

For more details refer to "EDIM626 - Exception Action Definition Screen" in Chapter 5, "Screen Descriptions".

### Resolution/Query

Resolution/Query are user activities. Use the Sterling Gentran:Viewpoint Exception Inquiry option to achieve resolution for Exception Management or use your own application support system that has been connected to Sterling Gentran:Viewpoint through Auto Actions. Exception Inquiry provides powerful tools to manage and resolve the exceptions that have been captured. For Tracking Management, you have the ability to query the status and history for any item being

tracked through the extended EDI system. Queries may be saved and reused, and you can view any exceptions you may have captured for the item.

Perform this activity on an ongoing basis.

For more detailed information refer to "Exception Inquiry Screens" and "EDIM702 -Query Request Screen" in Chapter 5, "Screen Descriptions".

### **Maintenance/Inquiry**

Maintenance and Inquiry is a user-initiated activity performed by Sterling Gentran:Viewpoint. The Maintenance/Inquiry Options function of the Online Facility is used to define the control parameters for running Maintenance and Inquiries against the Sterling Gentran:Viewpoint Repository, Profiles, and Master Index. Maintenance options allow for archiving and restoring purged data.

Perform this activity as required.

For more details refer to "Extended System Management Screens" in Chapter 5, "Screen Descriptions," and to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 1, "Batch Program Descriptions".

## How To Get Help

IBM® Sterling Customer Center provides a wealth of online resources that are available around the clock to enrich your business experience with IBM® Sterling Gentran®. By using Sterling Customer Center, you gain access to many self-support tools, including a Knowledge-Base, Documentation, Education, and Case Management. Access Sterling Customer Center at <http://customer.sterlingcommerce.com>.

Once logged in, select **Support Center** from the top navigation menu, and then locate Sterling Gentran product-specific support information from the left navigation menu.

Additionally, our Customer Support Reference Guide outlines our support hours, contact information, and key information that will enhance your support experience with us. For detailed information about Customer Support, please refer to the Customer Support Reference Guide accessible from the login page. (<http://customer.sterlingcommerce.com>)

# Implementation Process

This chapter describes the major steps to effectively implement Sterling Gentran:Viewpoint into your environment.

This chapter is organized into the following sections:

<b>Topic</b>	<b>Page</b>
Overview of Implementation.....	2-2
Develop a Configuration Strategy .....	2-4
Set Up the Sterling Gentran:Viewpoint System .....	2-11
Operational Procedures.....	2-20
Optional Features.....	2-23

## Overview of Implementation

The instructions in this chapter assume that the user performing these activities has the following:

- An understanding of the business requirements that Sterling Gentran:Viewpoint addresses.
- Familiarity with Sterling Gentran:Viewpoint features and functions.
- A working knowledge of the environment into which Sterling Gentran:Viewpoint will be installed.

Refer to Chapter 1, “Product Description” and to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Installation Guide* “Installing Sterling Gentran:Viewpoint” chapter to fulfil these prerequisites.

To implement your Sterling Gentran:Viewpoint system, complete the following major activities:

**Note:** With the exception of the tasks outlined in the "Set up the System" section, you can perform the implementation process activities before, or in parallel with, the installation. However, you must perform System Setup after installation has been completed (including the verification test).

**Develop a Configuration Strategy**

You can configure Sterling Gentran:Viewpoint in a variety of ways to meet a wide range of requirements. The “Develop a Configuration Strategy” section focuses on how to implement Sterling Gentran:Viewpoint to meet your requirements.

In particular, you should analyze your EDI environment for exceptions that you would like to monitor. If you have Tracking Management, you should determine which end-to-end paths you would like to track. That is, which applications would you like to include in tracking.

**System Setup**

After establishing a configuration strategy, you need to set up various files and parameters. The “Set up the System” section describes the steps for completing system setup.

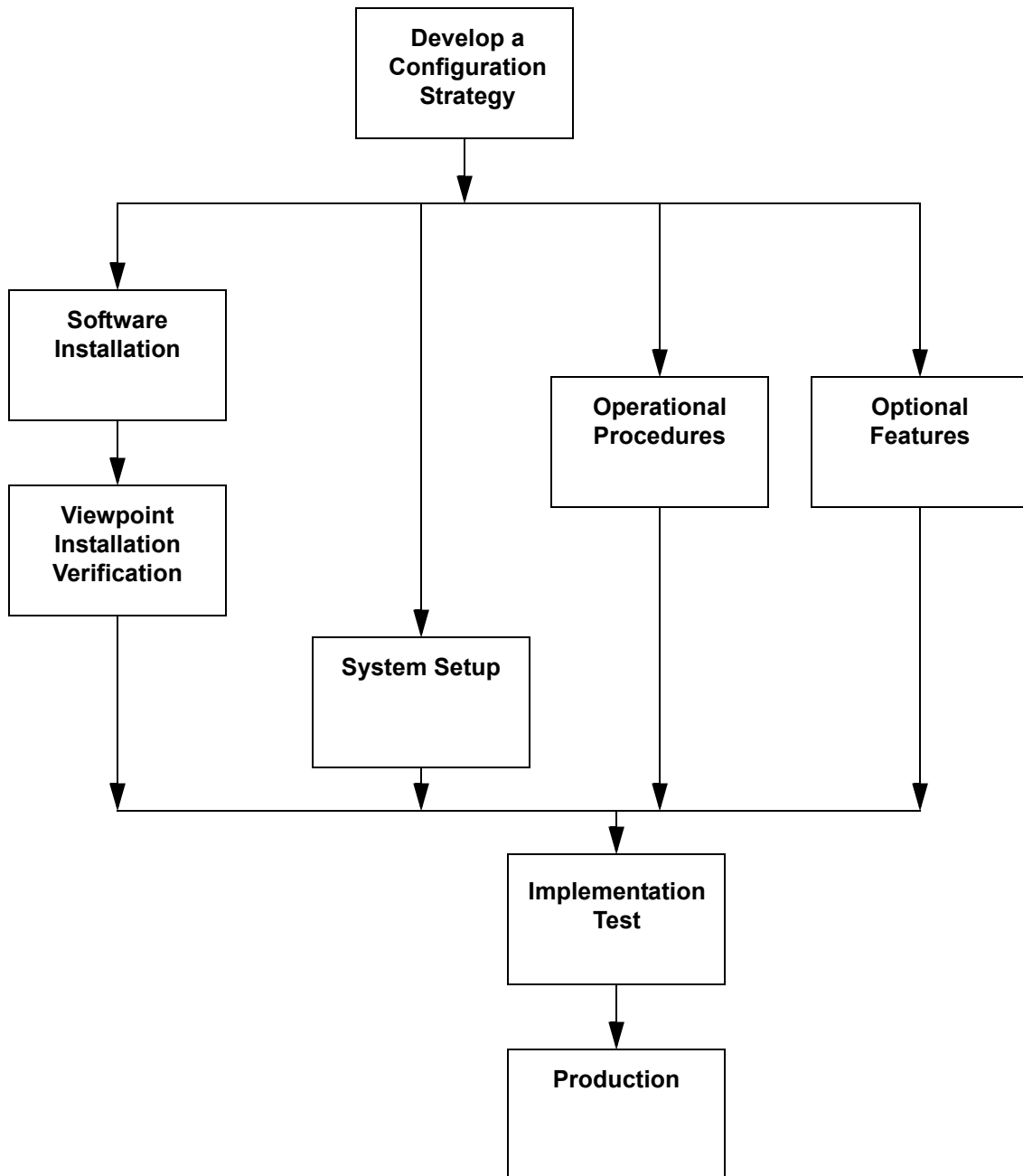
**Operational Procedures**

Based on the standards and policies of your environment, you may be required to establish certain procedures. The "Operational Procedures" section outlines these procedures.

**Optional Features**

Sterling Gentran:Viewpoint provides a number of optional features for managing the system, exceptions, and tracking. Depending on the capabilities of your environment, you may choose to implement these features. This activity describes these features, their benefits, and how to implement them.

Figure 2.1 illustrates the implementation process.



**Figure 2.1 Sterling Gentran:Viewpoint Implementation Process**

## Develop a Configuration Strategy

This section outlines decisions you need to make to configure Sterling Gentran:Viewpoint. Use these decisions as a guideline in setting up the Sterling Gentran:Viewpoint system.

You may implement Sterling Gentran:Viewpoint in a variety of ways to meet your specific requirements. The main considerations for your configuration strategy are as follows:

Consideration	Page
Sterling Gentran:Viewpoint users and security	2-4
Staging files	2-6
Tracking Points	2-7
Exception Management	2-8
Tracking Management (optional module)	2-9
Sterling Gentran databank configuration	2-10

These considerations are described in detail below.

### Sterling Gentran:Viewpoint Users and Security

Sterling Gentran:Viewpoint users fall into two categories: The first category of users performs administrative tasks such as system set up and maintenance. The second category performs end user tasks, for example: resolving problems that can occur with a business document or performing a query on a particular document.

To determine your requirements for defining Sterling Gentran:Viewpoint users, refer to the following references in Chapter 5, “Screen Descriptions.” These references describe functions used for administrative and business purposes:

#### **Administrative Type User:**

System Options Screens  
 Extended System Management Screens  
 Exception Management Screens  
 Tracking Management Screens

#### **Business Type User:**

Exception Management Screens  
 Exception Inquiry Screens  
 Tracking Management Screens

Sterling Gentran:Viewpoint users are defined using the Sterling Gentran:Basic Security Maintenance functions at the following four levels:

- Division (data access)
- Access (product access)
- Authority Level (function access)
- Recipient (user access)



### Division

Sterling Gentran:Viewpoint assigns a division to data captured for Exception Inquiry or Tracking Management from the Partner profile used to process the data. A division is also assigned to each User ID in Security Maintenance to control online access to data. The division of the User ID and the data is compared in the following manner:

- Users with division 000 have access to all data.
- Data with a division of spaces is visible to all users.
- Users with a specific division (for example, 100) may only access data with the same division.

### Access

Access controls which options display on the Sterling Gentran:Basic Main Menu for the User ID. Sterling Gentran:Viewpoint options display on the security selection list.

### Authority Level

When a User ID is granted access to the Sterling Gentran:Viewpoint subsystem, an Authority Level must also be specified to define the scope of view and update rights. The following Authority levels are provided:

Level	Has access to...	Permitted to...
System Administrator	System Options Extended System Management Exception Management Exception Inquiry Tracking Management	view and update
EDI Coordinator	Exception Management Exception Inquiry Tracking Management.	view and update
Business User	Exception Inquiry Tracking Management	view and update
Business User (no update)	Exception Inquiry Tracking Management	view

### Recipient

A User ID can also have access to the Exception Inquiry subsystem limited to a specific Recipient ID. This security level is used to limit access of sensitive data to only those staff members with a need to know. If this security level is not implemented, a User ID will have access to Exception data for all Recipient IDs.

Refer to the *IBM® Sterling Gentran:Basic® for z/OS® Release 6.6 User Guide* Chapter 5, “The Administration Subsystem” for complete details about Sterling Gentran:Viewpoint Security Options.

## Staging Files

Sterling Gentran:Viewpoint uses staging files as temporary holding areas for data and information received from the Gateways. This data is then processed by the Post Processor, based on the Sterling Gentran:Viewpoint profiles you defined (refer to Chapter 1, “System Architecture”).

You must determine how you will configure the staging files. Use the following rules and guidelines to determine your staging area configuration.

### Rules

- You must always define and enable at least one staging file for Sterling Gentran:Viewpoint to capture data.
- Only one tracking point may access a staging file at one time.
- A maximum of 20 staging files may be enabled.

### Recommended Configuration

When setting up Sterling Gentran:Viewpoint, you should define and enable one staging file per Tracking Point. This single staging file will be used as the temporary holding area for both Exception Management and Tracking Management.

The advantages of this configuration are:

- It maximizes system throughput.
- It allows critical processing to be isolated to a single staging file.

The following table shows an example of this strategy:

Direction	Tracking Point	Staging File
Outbound	Mapper	1
Outbound	Editor	2
Inbound	Editor	3
Inbound	Mapper	4
n/a	Ack Reconciliation	5

Chapter 2, “Set Up the Sterling Gentran:Viewpoint System,” provides the steps necessary for defining staging files.

## Tracking Points

Decide which tracking points to monitor with Sterling Gentran:Viewpoint.

For Exception Management and Tracking Management, the available tracking points are:

<b>Sterling Gentran Processes:</b>	
EBDI001	Inbound Editor
EBDI002	Outbound Editor
EBDI041	Inbound Mapper
EBDI042	Outbound Mapper
EDID205	Outbound EDI Databank Extract
EDID255	Sterling Gentran:Realtime Outbound EDI Databank Extract
EDID405	Inbound Application Databank Extract
EDID455	Sterling Gentran:Realtime Inbound Application Databank Extract
EDID510	Acknowledgement Reconciliation/Monitor
EDID515	Sterling Gentran:Realtime Acknowledgement Reconciliation/Monitor
EDID850	Network Reconciliation/Monitor
EDIR001	Sterling Gentran:Realtime Inbound Editor
EDIR002	Sterling Gentran:Realtime Outbound Editor
EDIR041	Sterling Gentran:Realtime Inbound Mapper
EDIR042	Sterling Gentran:Realtime Outbound Mapper
<b>Sterling Connect Processes:</b>	
MAILBOX	Sterling Connect
STOURL	Sterling Connect Offline Utilities
EDIR314	Sterling Connect Outbound Interface
EDIR316	Sterling Connect Inbound Interface

### For Tracking Management users only

You may also enable user applications for Tracking Management by defining them as User Tracking Points, and by having the applications call the Sterling Gentran:Viewpoint User Gateway. An important consideration for tracking is that in order to track an item from one tracking point to another (for example, business application to the Network), all tracking points in between must be enabled for tracking.

Refer to “Tracking Management” below and the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “User Exits and APIs” chapter for more details on defining User Tracking Points.

## Exception Management

The decisions you make for implementing Exception Management are at the heart of the implementation process. Identifying which exceptions should be captured, who should be notified, and how they should be notified will determine your initial configuration for managing exceptions.

To simplify this portion of your configuration strategy, refer to the following guidelines:

Identify Exceptions	Identify the events occurring in your Sterling Gentran or Sterling Connect processing that you wish to monitor/manage with Sterling Gentran:Viewpoint (example: Inbound Mapping Errors, a purchase order was just received from partner ABC).  For complete details on the available processes and criteria for exception capture, refer to: <ul style="list-style-type: none"><li>• “EDIM624 - Exception Capture Definition Screen” in Chapter 5, “Screen Descriptions”.</li><li>• “User Exit Parameters Chart” in the <i>IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide</i> “User Exits and APIs” chapter.</li></ul>
Identify Recipients	You can directly notify the person or persons responsible for responding to exceptions. Identify these people as recipients and associate them with the exceptions for which they are responsible.
Identify Automated Systems	If your environment has automated systems available (for example, e-mail), you may also use these systems for responding to captured exceptions. Identify the systems and associate them with exceptions and/or recipients.

Use the information derived from this guideline to complete the step, Build Sterling Gentran:Viewpoint Profiles in the “Set Up the Sterling Gentran:Viewpoint System” section of this chapter.

Chapter 3, **Tutorial**, in this document also details the steps required for managing exceptions.

## Tracking Management (optional module)

Tracking Management enables you to determine the status and history of an item (for example, a business document) as it travels through the extended EDI system. The more processes or applications enabled for tracking, the more complete will be the history for the item.

**Note:** Use caution when deciding to track all documents or items, as this will require a significant amount of storage.

Enable Tracking Management on the Sterling Gentran:Viewpoint record in the Sterling Gentran Configuration file. Once enabled, all valid tracking points generate and pass information to Sterling Gentran:Viewpoint.

In order to limit the volume of data that is to be tracked, Sterling Gentran:Basic contains flags in the partner profile that indicates whether Sterling Gentran:Viewpoint Tracking is enabled. By default, tracking information is retained for all levels unless the indicator value is set to No.

You can limit tracking communications information using remote IDs. Specify the remote IDs to be included or excluded from Tracking Management on the Tracking Point Remote ID Control screen (EDIM606). Refer to "EDIM606 -Tracking Point Remote ID Control Screen" in Chapter 5, Screen Descriptions, of this document.

For deciding on applications to track, several options are available:

### **Track using Sterling Gentran Tracking Points only**

This is the simplest approach to tracking, and involves the least amount of effort. By using the Sterling Gentran tracking points you could, for example, track a document (by the document user reference) through the outbound processes (Mapper, Editor, Databank Extract), when the Network processed it (Network Reconciliation), and when the trading partner validated it (Acknowledgment Reconciliation). You can track the same data by its EDI forms (for example, transactions, functional groups, and interchanges) as long as the identifiers are known. You can follow a similar approach for inbound data as well.

### **Add Sterling Connect Tracking Points**

For Sterling Gentran:Plus users, communication items or batches can also be tracked for Sterling Connect, Sterling Connect Offline Utilities (STOUTL), and Sterling Connect Outbound and Inbound Interfaces. You can now track a document from user application, to the translation process, to communications.

### **Add Business Applications as Tracking Points**

The next approach to Tracking Management is to add business applications to the tracking process. For example, you can enable a receivables system to call the Sterling Gentran:Viewpoint Gateway so that a Tracking Management user would know when an invoice was generated in the receivables system. The invoice document can then be tracked through the entire EDI process. Adding applications as tracking points involves defining the tracking point, enabling the application to call the Sterling Gentran:Viewpoint Gateway, and passing or accepting a fixed format Trace ID record. This Trace ID links the document, or item, throughout the tracking path.

### **Add Other Operational Applications as Tracking Points**

Similar to adding business applications, you can enable other operational applications for tracking by having them call the Sterling Gentran:Viewpoint Gateway. For example, you can add a communications package to the tracking path by having it call the Sterling Gentran:Viewpoint Gateway from an exit. The application must be able to pass, or accept, the fixed format Trace ID record used with Sterling Gentran:Viewpoint Tracking Management or a user program needs to be written to parse out this record prior to running the communications application. In this situation, the exit used in the application would need to reconcile the status information with the Trace ID information created by the parsing program prior to calling the Sterling Gentran:Viewpoint Gateway.

More information on User Gateways can be found in the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “User Exits and APIs” chapter.

## **Sterling Gentran Databank Configuration**

Sterling Gentran:Viewpoint uses much of the data and information that is stored with the Sterling Gentran:Basic and/or Sterling Gentran:Realtime Databanks.

**Note:** The Databank associated with any Sterling Gentran tracking point that is going to be monitored by Sterling Gentran:Viewpoint must be configured to have at least a Directory-level configuration. For example, if the Outbound Editor is going to be monitored, the Outbound EDI databank must be configured with Directory-level.

If Exception Inquiry or Tracking Management users access the Data Display, the databank for the tracking point must be configured with Message Store-level. For more details about the Data Display, refer to Chapter 5, "Screen Descriptions".

## Set Up the Sterling Gentran:Viewpoint System

This section outlines the steps for setting up the Sterling Gentran:Viewpoint system. Use the information that was developed in the previous section, “Develop a Configuration Strategy” here.

**Note:** This section assumes that the Sterling Gentran:Viewpoint Installation Verification has been completed for all Sterling Gentran products (that is, Sterling Gentran:Basic, Sterling Gentran:Plus, Sterling Gentran:Realtime) that are enabled for Sterling Gentran:Viewpoint monitoring.

The steps required to set up the Sterling Gentran:Viewpoint system are:

Step	Action	Page
1.	Identify where Sterling Gentran:Viewpoint will be set up initially	2-11
2.	Re-allocate files for production space requirements	2-11
3.	Review/Revise CICS Region	2-14
4.	Set up Tracking Points	2-15
5.	Revise Sterling Gentran JCL	2-15
6.	Update the Sterling Gentran Configuration file	2-15
7.	Define Sterling Gentran:Viewpoint Users	2-16
8.	Build Sterling Gentran:Viewpoint Profiles	2-16
9.	Build Tracking Management Queries	2-16
10.	Set Sterling Gentran:Viewpoint System Options	2-17
11.	Review/Revise Databank Configuration	2-17
12.	Integrate communications monitoring	2-17

### Step 1 Identify where Sterling Gentran:Viewpoint will be set up initially

The first step in setting up the Sterling Gentran:Viewpoint system is to identify where Sterling Gentran:Viewpoint will reside initially. The alternatives are to set up Sterling Gentran:Viewpoint in a production environment immediately or set up Sterling Gentran:Viewpoint in a test environment and then migrate to production.

**Note:** It is recommended that Sterling Gentran:Viewpoint be implemented in a test environment initially.

### Step 2 Re-allocate files for production space requirements

Sterling Gentran:Viewpoint uses Sterling Gentran:Viewpoint-specific files, as well as the existing databank files for detailed status information and data. The following files are part of the Sterling Gentran:Viewpoint system:

File	Description
Archive file	The Archive file contains items removed from the Profiles, Repository, and Master Index files.
Configuration file	The Configuration file contains records to control system level features and options.
JCL file	The JCL file contains entries for JCL streams, which are submitted for execution through online functions.
Profile file	The Profile file contains the rules, which are used to control the system, as defined in Extended System Management, Exception Management, and Tracking Management.
Prompt file	The Prompt file contains system information which is used for online prompt requests.
Repository file	The Repository file contains information relating to exceptions detected by Sterling Gentran:Viewpoint. The repository includes control/status information relating to the exception, system messages relating to the exception, as well as user entered exception management information relating to the exception. The Repository file also contains status and history information relating to items tracked by Tracking Management.
Staging files	The Staging files pass data from a Sterling Gentran:Viewpoint enabled system to Sterling Gentran:Viewpoint. Staging files contain system messages issued by the Sterling Gentran:Viewpoint enabled system as well as control, status, and tracking information.
Staging TSQs	The Staging TSQs pass data from the Online Gateway, Online User Gateway and the Communications Post Processor to Sterling Gentran:Viewpoint. The Staging TSQs contain system messages as well as control, status, tracking and communications information.
Master Index	<b>This file is only available with the Tracking Management module.</b> The Master Index is used by the Tracking Management module, to store information about each item or document to be tracked. The Master Index provides fast access to information by providing "fast paths," or alternate keys, for common reference criteria such as User Reference and Partner.
Trace ID file	<b>This file is only available with the Tracking Management module.</b> The Trace ID file is used by batch processes to ensure the uniqueness of Trace IDs associated with items as they travel through the extended EDI system.



File	Description
Online Trace ID file	<b>This file is only available with the Tracking Management module.</b> The Online Trace ID file is used by online processes to ensure the uniqueness of Trace IDs associated with items as they travel through the extended EDI system.
Sterling Connect Failure Codes file	<b>This file is only available for Sterling Gentran:Plus users.</b> The Sterling Connect Failure Codes file contains the text messages associated to communications failure codes.
Sterling Connect Cross Reference file	<b>This file is only available for Sterling Gentran:Plus users.</b> The Sterling Connect Cross Reference file contains the record of which communications batch numbers were re-assigned after running the Sterling Connect maintenance utilities.
Communications Queue file	<b>This file is only available for Sterling Gentran:Plus users.</b> The Communications Queue file is used to pass Sterling Connect Communications Log file information to Sterling Gentran:Viewpoint.
Trace ID Cross Reference file	<b>This file is only available for Sterling Gentran:Plus users of the Tracking Management module.</b> The Trace ID Cross Reference file is used to store Sterling Gentran:Viewpoint Trace IDs assigned to communications batch numbers.

The Sterling Gentran:Viewpoint system uses standard VSAM file sharing features between CICS and batch processing. All Sterling Gentran:Viewpoint files are updated in either CICS or batch, and are defined with VSAM Shareoptions of 2,3 except for the Communications Queue file and the Trace ID Cross Reference file which have VSAM Shareoptions of 4,3.

Multiple Sterling Gentran:Viewpoint enabled processes, which run concurrently, can not access the same Staging file. Each process, which may run concurrently, must have a unique Staging file.

When performing maintenance, using the Sterling Gentran:Viewpoint Maintenance/Inquiry program, the files being processed must not be open for update access in CICS. Inquiry may be performed while CICS has update access.

The following files will likely require re-allocation after installation verification to meet the space requirements for your implementation of Sterling Gentran:Viewpoint:

- Profiles file
- Repository file
- Master Index (Tracking Management only)
- Staging file(s)
- Communications Queue file (Sterling Gentran:Plus users only)
- CICS Auxiliary Storage

**Note:** Staging Temporary Storage Queues (TSQs) are stored as CICS Auxiliary TSQs, which are created as entries on the CICS Auxiliary Temporary Storage (DFHTEMP) data set. Sterling Gentran:Realtime users should examine their requirements for CICS Auxiliary Storage.

Enabling Exception Management and Tracking Management for all business activity uses a considerable amount of storage. This is especially true of Tracking Management as an item can travel through many processes and transforms several times. Review space requirements carefully and reallocate depending on the volume of transactions at your installation.

Perform the following activities for each file:

1. Calculate the space requirements for each file. For detailed information on space calculations for these files, refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Installation Guide* “File Descriptions” chapter.
2. Define and initialize each file using the JCL supplied with the system. Refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Installation Guide*, Appendix A, “Library Descriptions” for a list of the JCL supplied with the system.

### **Step 3 Review/Revise CICS Region**

The CICS resource definitions and region JCL will most likely need to be revised to meet the standards of your environment.

For detailed information regarding these activities, refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “CICS Region Information” chapter.

Perform the following activities to complete this step:

1. CICS Region JCL  
Add the necessary JCL statements to your CICS Region JCL.
2. File Resource Definitions  
Review the Resource Definitions for all Sterling Gentran:Viewpoint files.
3. Transaction Resource Definitions
  - If you use an "Exception Action" Online Procedure (see "EDIM626 - Exception Action Definition Screen" in Chapter 5, "Screen Descriptions"), add the necessary CICS Resource Definition for defining the transaction ID to initiate the Exception Action online procedure.
  - If you use a Tracking User Exit procedure (see “EDIM685 - System Options Screen” in Chapter 5, “Screen Descriptions”), add the necessary CICS Resource Definition for the transaction ID to initiate the Tracking User Exit procedure.
4. Program and Mapset Resource Definitions  
Review the Resource Definitions for all Sterling Gentran:Viewpoint programs.
5. PLT Entry (optional)

If you initiate the Sterling Gentran:Viewpoint Scanner at region start-up, add a CICS PLT entry for the Automatic System Start-Up (EDIVPLT) program.

### Step 4 Set up Tracking Points

Use the Sterling Tracking Point Directory screen to enable the Sterling Gentran or Sterling Connect tracking points that are to be monitored (for exceptions and tracking) and disable the tracking points that will not be monitored. It is important to note that to track information along an end-to-end path (for example, the outbound path), all tracking points along the path must be enabled. Breaking the chain will prohibit the display of the complete history for an item.

Refer to “EDIM602 - Sterling Tracking Point Directory Screen” in Chapter 5, “Screen Descriptions,” and Chapter 3, “Tutorial” for detailed information on enabling and disabling Tracking Points.

For Tracking Management, you may also enable user applications for tracking. This involves defining the user tracking point, and enabling the application to support a fixed format Trace ID record and call the Sterling Gentran:Viewpoint Gateway. Both online and batch applications are allowed for tracking. Refer to “EDIM610 - User Tracking Point Directory Screen” in Chapter 5, “Screen Descriptions”. Also, refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “User Exits and APIs” chapter.

### Step 5 Revise Sterling Gentran JCL

Any JCL you use for running programs that are defined as Tracking Points must be revised to include the JCL statements required by Sterling Gentran:Viewpoint. The following JCL must be inserted:

#### For Exception and Tracking Management:

```
//EDIVP DD DSN=...,DISP=SHR - Viewpoint Profiles file
```

```
//EDIVSF DD DSN=...,DISP=SHR - Viewpoint Staging file
```

#### For Tracking Management:

```
//EDIVT DD DSN=...,DISP=SHR - Trace ID file
```

#### For Sterling Gentran:Plus users of Tracking Management:

```
//EDIVPPX DD DSN=...,DISP=SHR - Trace ID Cross Reference file
```

Only required for the following tracking points:

**EBDI001** Inbound Editor

**EBDI002** Outbound Editor

**EDID205** Outbound EDI Databank Extract

### Step 6 Update the Sterling Gentran Configuration file

Update the Sterling Gentran system Configuration file to include the Sterling Gentran:Viewpoint configuration entry. This adds the required Sterling Gentran:Viewpoint configuration information to your Sterling Gentran environment. Refer to “Update the Configuration file” in the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Installation Guide* “Installing Sterling Gentran:Viewpoint” chapter.

**Step 7 Define Sterling Gentran:Viewpoint Users**

Based on the results from “Sterling Gentran:Viewpoint Users and Security” in the section, “Develop a Configuration Strategy,” define your Sterling Gentran:Viewpoint Users using the Sterling Gentran Security Maintenance option.

**Step 8 Build Sterling Gentran:Viewpoint Profiles**

Based on the results from "Exception Management" in the section, "Develop a Configuration Strategy," you may now build your initial Exception Profiles.

Perform the following activities for each profile you wish to build:

1. Define the Exception Capture Definition  
Refer to "EDIM624 - Exception Capture Definition Screen" in Chapter 5, "Screen Descriptions" and Chapter 3, "Tutorial" to complete this activity. Note that any Exception Profile that is created can use these Capture definitions.
2. Define the Exception Action Definition (optional)  
An Exception Profile may include Exception Actions for automating the response to an exception. Refer to the “EDIM626 -Exception Action Definition Screen” in Chapter 5, “Screen Descriptions,” and Chapter 3, “Tutorial”. For detailed information on implementing the required user interface for using Exception Actions, refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “User Exits and APIs” chapter. Note that any Exception Profile that is created can use these Exception Action definitions.
3. Create the Exception Profile  
Use the Exception Profile to combine all the components you have defined for responding to an exception. The capture definition, recipient and, optionally, the action definition are all joined in the Exception Profile for automating the response to an exception.  
Refer to "EDIM622 - Exception Profile Definition Screen" in Chapter 5, "Screen Descriptions" and Chapter 3, "Tutorial," for detailed information on defining an Exception Profile.

**Step 9 Build Tracking Management Queries**

Based on the results from "Tracking Management" in the section, "Develop a Configuration Strategy,” you may now build your initial Tracking Management Queries. These are queries that you know you will use repeatedly in monitoring your environment. Alternatively, you can perform queries in an ad hoc way on a day-to-day basis, and save them for when more knowledge of required tracking information is determined.

Perform the following activities for each query you wish to save:

1. Establish the Query  
It may take a number of iterations of setting search criteria (both basic and extended) and analyzing the results before you have established a query that produces manageable results.  
Refer to "EDIM702 - Query Request Screen" in Chapter 5, "Screen Descriptions".
2. Save the Query

Once you have established a query, you may save it using the Add function from the Query Request screens. Refer to Chapter 5, "Screen Descriptions" for more details.

### **Step 10 Set Sterling Gentran:Viewpoint System Options**

This step completes the options you need to set for configuring your Sterling Gentran:Viewpoint system.

Refer to "EDIM685 - System Options Screen" in Chapter 5, "Screen Descriptions," for detailed information regarding these options.

You must set the following options:

- System Status
- System Trace
- Scan Interval
- Error User Exit (Optional)
- Error User Exit Data (Optional)
- Tracking User Exit (Optional)
- Staging file Control
- Staging TSQ Full

### **Step 11 Review/Revise Databank Configuration**

Based on the results from "Sterling Gentran Databank Configuration" in the section, "Develop a Configuration Strategy," you should now reconfigure your Databank Configuration.

Refer to the *IBM® Sterling Gentran:Basic® for z/OS® Release 6.6 Installation Guide*, Appendix A, "Implementing the Databank Facility," for complete details.

### **Step 12 Integrate communications monitoring**

For Sterling Gentran:Plus users integrating communications monitoring into their Sterling Gentran:Viewpoint system, the following changes are required to the Sterling Connect and/or Sterling Gentran:Plus systems.

#### **Sterling Connect Changes**

Modify the Sterling Connect Options Definition File (ODF) to specify the Sterling Gentran:Viewpoint Log Exit program:

**XLOG=EDIVLX or EDIVLXU**

For more information about the Sterling Gentran:Viewpoint Log Exit programs, refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* "Batch Program Descriptions" chapter.

Add the following DD statement to the JCL for starting the online portion of your communications system (Sterling Connect):

```
//EDIVCQ DD DSN=GENTRAN.V6X6.VPT.VSAM.EDI.EDIVCQ,DISP=SHR
```

Include the load library for the Sterling Gentran:Viewpoint Log Exit module by adding the following DD statement to the STEPLIB, or JOBLIB concatenation, in the JCL for starting the online portion of the communications system (Sterling Connect).

```
// DD DSN=GENTRAN.V6X6.VPT.CONNECT.LOAD,DISP=SHR
```

### Sterling Gentran:Plus JCL Changes

In the JCL to execute the Sterling Connect Offline Utilities ADD function, change the DD statement for the SYSPRINT and REPORTS files to save the reports to cataloged data sets as follows:

```
//SYSPRINT DD DSN=GENTRAN.V6X6.GPL.ADD.SYSPRINT,
//          DISP=(NEW,CATLG,DELETE),
//          UNIT=DISK,
//          VOL=SER=XXXXXX,
//          SPACE=(TRK,(5,5),RLSE),
//          DCB=(RECFM=FBA,LRECL=133,BLKSIZE=1330)
```

```
//REPORTS DD DSN=GENTRAN.V6X6.GPL.ADD.REPORTS,
//          DISP=(NEW,CATLG,DELETE),
//          UNIT=DISK,
//          VOL=SER=XXXXXX,
//          SPACE=(TRK,(5,5),RLSE),
//          DCB=(RECFM=FBA,LRECL=133,BLKSIZE=1330)
```

The SYSPRINT and REPORTS file data sets should be passed to the Sterling Gentran:Viewpoint STOUTL Report Processor program (EDIN110) as the EDIVOUXR and EDIVOURT data sets, respectively.

**Note:** If using IBM® Sterling Connect:Enterprise® version 1.4 or higher, change the DCB parameter for the REPORTS DD statement to:

```
DCB=(RECFM=FBA,LRECL=173,BLKSIZE=1730)
```

In the JCL to execute the Sterling Connect Offline Utilities EXTRACT function, the DD statement for the REPORTS file should be changed to save the report to a cataloged data set as follows:

```
//REPORTS DD DSN=GENTRAN.V6X6.GPL.EXTRACT.REPORTS,
//          DISP=(NEW,CATLG,DELETE),
//          UNIT=DISK,
//          VOL=SER=XXXXXX,
```

```
//          SPACE= (TRK, (5, 5), RLSE) ,  
//          DCB= (RECFM=FBA, LRECL=133, BLKSIZE=1330)
```

The REPORTS file data set should be passed to the Sterling Gentran:Viewpoint STOUTL Report Processor program (EDIN110) as the EDIVOURT data set.

**Note:** If using Sterling Connect:Enterprise version 1.4 or higher, change the DCB parameter for the REPORTS DD statement to:

```
DCB= (RECFM=FBA, LRECL=173, BLKSIZE=1730)
```

All Sterling Gentran:Plus inbound and outbound translation JCL streams should be changed to execute the Sterling Gentran:Viewpoint STOUTL Report Processor Program (EDIN110) immediately after the Offline Utilities (STOUTL). For a model of these JCL streams, refer to members **INGPL** (inbound) and **OUTGPL** (outbound) in the GENTRAN.V6X6.VPT.JCL data set.

Refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 1, “Batch Program Descriptions” for more information about the “EDIN110 - STOUTL Report Processor”.

The Sterling Gentran:Plus JCL member REORGDB should be replaced by the REORGDB member included in the GENTRAN.V6X6.VPT.JCL data set. The Sterling Gentran:Viewpoint version contains statements to run the Sterling Gentran:Viewpoint Communications Re-Org Program (EDIN120).

## Operational Procedures

Sterling Gentran:Viewpoint is designed for automated operation. This section provides operational procedures for monitoring the system as well as maintaining your Sterling Gentran:Viewpoint files.

The procedures documented are:

Procedure	Page
Monitor System Activity	2-20
Perform File Maintenance Procedures	2-21
Dynamically Enable/Disable the Sterling Gentran:Viewpoint System	2-22
Dynamically Enable/Disable Tracking Points	2-22
Dynamically Enable/Disable Sterling Gentran:Viewpoint Profiles	2-22

### Monitor System Activity

Data captured by Sterling Gentran:Viewpoint is automatically processed in the background for the user. Sterling Gentran:Viewpoint provides two methods for monitoring this activity:

- The Online Log Display
- System Options - Error User Exit

The Sterling Gentran:Viewpoint system requires a minimal amount of human intervention under normal circumstances.

#### Online Log Display

The Online Log Display provides a real-time view of the Sterling Gentran:Viewpoint online system. As the Sterling Gentran:Viewpoint system runs (largely as background CICS tasks), it records errors and other critical events on the log. The Online Log can be displayed for immediate diagnosis of system conditions. Enable the Systems Options - System Trace feature to display additional detail on the log. For detailed information regarding the Online Log Display refer to “EDIM688 - Online Log Display Screen” in Chapter 5, “Screen Descriptions”.

#### System Options - Error User Exit

The System Options - Error User Exit feature allows the Sterling Gentran:Viewpoint system to report system errors to a user supplied program. The message is then forwarded by the user supplied program to a central automation system or an operator to be notified. Specify this option from the System Options screen. Refer to “System Options - Error User Exit” in the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “User Exits and APIs” chapter for detailed information on using this option.



### Perform File Maintenance Procedures

Sterling Gentran:Viewpoint provides flexible user control for maintaining the Sterling Gentran:Viewpoint files. Using the “Maintenance/Inquiry Options” screen in “Extended System Management,” you may create definitions for handling all of your file maintenance needs.

Use the EDIN140 - Maintenance/Inquiry batch program to maintain the Profiles, Repository and Master Index files off-line. Perform housekeeping to remove items that are no longer required. An example of housekeeping would be to remove all exceptions from the repository that have been closed.

The files that require periodic housekeeping are:

- Sterling Gentran:Viewpoint Profiles
- Sterling Gentran:Viewpoint Repository
- Sterling Gentran:Viewpoint Master Index (Tracking Management only)

Perform the following steps for each file:

1. Create the maintenance definition(s) required for maintaining the file. Refer to "EDIM609 - Maintenance/Inquiry Options Definition Screen" in Chapter 5, "Screen Descriptions," for detailed information regarding the wide range of selection criteria available for file maintenance control.
2. Create the JCL required for running the Maintenance/Inquiry program (EDIN140). Sample JCL has been provided with the system. Refer to program “EDIN140 - Maintenance/Inquiry” in the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “Batch Program Descriptions” chapter for detailed information on setting up these control parameters.
3. Add this JCL to your operations processing schedule.

**Note:** The batch program EDIN140 - Maintenance/Inquiry must have exclusive control of the file(s) while performing a Purge, Restore, or Archive operation. EDIN140 does not require exclusive file control while performing the Inquiry operation.

The frequency for performing housekeeping against these files will be based on your volumes, space calculations, and retention requirements.

## Dynamically Enable/Disable the Sterling Gentran:Viewpoint System

Sterling Gentran:Viewpoint allows dynamic enabling or disabling of the entire system while the CICS region is running.

To manually disable the Sterling Gentran:Viewpoint online background processing system, use the System Options screen to change the System Status to disabled. Disabling the system causes the following state:

1. The Sterling Gentran:Viewpoint Scanner will shut down (that is, the staging area is not processed).
2. The Sterling Gentran:Viewpoint Gateway will *still* pass data from Tracking Points to the Staging Area.

To automate the process, run a batch utility program that can start the CICS transaction EDIW to execute the System Status Toggle Program (EDIVTOGL).

**Note:** The specific batch utility program used to automate the process is site dependant. You should consult your systems programmers to determine which utility to use.

## Dynamically Enable/Disable Tracking Points

Sterling Gentran:Viewpoint allows dynamic enabling or disabling of individual Tracking Points while the CICS region is running.

To disable a Tracking Point, use the Tracking Point Directory screen to change the Tracking Point Status to disabled. While a Tracking Point is disabled, the Gateway rejects any requests from that Tracking Point (that is, data will not be passed through to Sterling Gentran:Viewpoint). Exceptions that were captured prior to the tracking point being disabled are still available to Exception Inquiry Users.

## Dynamically Enable/Disable Sterling Gentran:Viewpoint Profiles

Sterling Gentran:Viewpoint allows dynamic enabling or disabling of individual Exception Profiles while the CICS region is running.

To disable an Exception Profile, use the Exception Profile Directory screen to change the Profile Status to disabled. While a profile is disabled data in the staging area for that profile will not be processed by Sterling Gentran:Viewpoint.

## Optional Features

Optional Features are described in this section. These features enable you to take full advantage of the powerful functions Sterling Gentran:Viewpoint provides.

The Optional Features described in this section are:

Feature	Page
System Options - Error User Exit	2-23
Trading Profile Integration	2-23
Exception Actions	2-24
User Messages	2-26
User Procedures	2-26
Tracking User Exit	2-27

### System Options - Error User Exit

The System Options - Error User Exit provides the capability for a user-supplied program to be initiated when a severe condition occurs within Sterling Gentran:Viewpoint.

A System Options - Error User Exit may be specified from the System Options screen (EDIM685). Any severe condition occurring in Sterling Gentran:Viewpoint (for example, staging file full) causes this exit to be initiated. The Sterling Gentran:Viewpoint Error User Exit passes the system message ID to the user program. Any value entered in the Data field on the System Options screen (EDIM685) is also passed to the user program.

Possible severe conditions are:

- Staging file full
- Post Processor cannot continue (I/O error)

For detailed information on the use of the “Systems Options - Error User Exit” refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “User Exits and APIs” chapter.

### Trading Profile Integration

Sterling Gentran:Viewpoint allows you to control the monitoring of documents based upon your Sterling Gentran trading profiles. You can control whether or not documents should be monitored (for exceptions and/or tracking status) by completing the Sterling Gentran:Viewpoint options in Sterling Gentran:Basic Partner Maintenance.

For Exception Management, the Sterling Gentran:Viewpoint option can be specified on any or all three of the trading profile levels: Control Information, Group Information, and Transaction Information. It is recommended that all three levels be specified to provide the maximum coverage for exceptions.

For Tracking Management, you can also specify the Sterling Gentran:Viewpoint option on any or all three of the trading profile levels: Control Information, Group Information, and Transaction Information. How it is specified is particularly important for Tracking Management as this module can generate a large amount of data depending on the volume of transactions.

Use the Sterling Gentran:Viewpoint Trading Profile option for the following processes in Sterling Gentran:

Tracking Points	Description
EBDI001	Inbound Editor
EBDI002	Outbound Editor
EBDI041	Inbound Mapper
EBDI042	Outbound Mapper
EDIR001	Sterling Gentran:Realtime Inbound Editor
EDIR002	Sterling Gentran:Realtime Outbound Editor
EDIR041	Sterling Gentran:Realtime Inbound Mapper
EDIR042	Sterling Gentran:Realtime Outbound Mapper

For both Exception Management and Tracking Management, there may be no need to make any changes to your trading profiles. The default for Sterling Gentran:Viewpoint in trading profiles is YES. This implies that even though the option appears as blank in your trading profile, Sterling Gentran:Viewpoint still monitors that relationship based on your Sterling Gentran:Viewpoint Profiles. You can override this default on the Configuration file so that a blank for Exception Management flags and Tracking Management flags can mean Yes or No.

For detailed information regarding the use of the Sterling Gentran:Viewpoint Trading Profile option, refer to the *IBM® Sterling Gentran:Basic® for z/OS® Release 6.6 User Guide* “The Partner Subsystem” chapter.

## Exception Actions

Exception Actions enable you to fully automate your responses to exceptions that occur. An example of an exception action would be to send a FAX message to your trading partner notifying them that you have rejected their invoice.

The user program, initiated by an Exception Action, may be a batch program or an online program. If the user program is an online program, you only need to perform steps 1 and 2. If the user program is a batch program, you must perform all of the following steps:

1. Prepare Interface

*IBM® Sterling Gentran:Basic® for z/OS® Release 6.6 Technical Reference Guide* “User Exits and APIs” chapter documents the “Exception Action” in detail, specifically the communications area that is passed to the user program from Sterling Gentran:Viewpoint.

Review this section to determine how the user program will receive data from the Sterling Gentran:Viewpoint Exception Action.

2. Define the Exception Action

Refer to "EDIM626 - Exception Action Definition Screen" in Chapter 5, "Screen Descriptions," for details on how to define an exception action.

**Note:** If the user program is a batch program, the Batch Procedure field must be specified as the actual program name of the user program.

3. Create Batch JCL

Using the sample JCL provided for program "EDIN200 - Batch Action Processor," create the JCL necessary for running the user supplied batch program.

4. Load the Online JCL file

Using the program "EDIG010 - Online JCL File Maintenance," load the JCL created in **step 3** into the Online JCL file. For detailed information on using the program "EDIG010 - Online JCL file Maintenance," refer to the *IBM® Sterling Gentran:Basic® for z/OS® Release 6.6 Technical Reference Guide* "Batch Program Descriptions" chapter.

## User Messages

User Messages allow you to define messages which have explanations that are relevant and meaningful to you. User Messages may be associated with Capture Definitions. By attaching a User Message to an Exception Capture Definition, the User Message is available to you while you are working on exceptions. The User Message can be used online, at the time and place you require the information to resolve the exception.

The User Message is displayed for the current exception from the "EDIM662 - User Message Display Screen". Refer to Chapter 5, "Screen Descriptions" for detailed information.

Refer to Chapter 3, "Tutorial" for an example of how to use User Messages.

## User Procedures

User Procedures allow you to document actions, steps or procedures that should be followed when resolving an exception.

User Procedures may be attached to Exception Capture Definitions. By attaching a User Procedure to an Exception Capture Definition, the User Procedure is available to end users while they are working on exceptions. The User Procedure can be used online, at the time and place the end user requires the information to resolve the exception.

The User Procedure may be retrieved from Exception Inquiry on the "EDIM663 -User Procedure Display Screen". Refer to Chapter 5, "Screen Descriptions" for more information.

Refer to Chapter 3, "Tutorial" for an example of how to use User Procedures.

### Tracking User Exit

The Tracking Management module provides a tracking user exit that can be invoked each time an item is processed by the Sterling Gentran:Viewpoint Post Processor. This provides the ability to post tracking information to an alternate repository, such as a database from which you can perform your own queries or reports.

The Tracking User Exit must be an online program and is specified in the Sterling Gentran:Viewpoint System Options as a transaction ID. An online program is used to avoid the amount of overhead and possible system flooding that might occur if batch jobs are submitted as each item (for example, transaction or document) is processed by the Post Processor.

Refer to the *IBM® Sterling Gentran:Basic® for z/OS® Release 6.6 Technical Reference Guide* “User Exits and APIs” chapter for details on the communications area used with this user exit, and on how the user program receives data from Sterling Gentran:Viewpoint.





This chapter is organized into the Exception Management Tutorial and the Tracking Management Tutorial. It is designed to provide a new user with a basic understanding of setting up, managing exceptions and using Tracking Management with Sterling Gentran:Viewpoint.

Chapter 3 may be used in two ways: you can read and perform the tutorial from beginning to end (which is recommended for new users), or you can refer to the actions listed below for a quick reference to the specific tasks of using Sterling Gentran:Viewpoint.

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# Exception Management Tutorial

This Tutorial will demonstrate how to perform the basic tasks required to use the Sterling Gentran:Viewpoint system. By navigating through the Sterling Gentran:Viewpoint screens and performing common tasks, you will become acquainted with the functions used for managing exceptions.

It is recommended that you read Chapter 1, "Product Description" before performing the tutorial. The Product Description will familiarize you with the features, concepts, and terminology of Sterling Gentran:Viewpoint. You may also refer to the Glossary.

Using Sterling Gentran:Viewpoint to manage exceptions can be described in the following procedures:

### **Determining Exception Management Business Requirements**

The first step in managing an exception is to identify what the exception is, and how the exception should be responded to. "Determining Exception Management Business Requirements" is an analysis task. A thorough analysis will simplify exception setup. The tutorial provides five sample business requirements that may be used as models for your own implementation. The sample business requirements are described later in "Determining Exception Management Business Requirements".

### **Exception Management Tutorial Setup**

Tutorial Setup provides information for setting up the tutorial.

### **Exception Setup**

Exception Setup allows you to define which events are exceptions, and how they should be responded to.

The Tutorial provides a complete walk-through for setting up the first sample business requirement. Setup can then be repeated for the other four sample business requirements.

### **Exception Management Tutorial Processing**

Tutorial Processing provides instructions for the tutorial batch processing.

### **Exception Inquiry**

Exception Inquiry provides you with the ability to respond to and resolve exceptions that have been captured.

Exception Inquiry is the primary task you will perform daily using Sterling Gentran:Viewpoint. The tutorial walks you through the Sterling Gentran:Viewpoint "review and response" capabilities.

### **Exception Management Reports**

A wide range of reporting criteria and procedures for requesting and printing reports are provided.

### **Exception Management Housekeeping**

Housekeeping provides operational flexibility for maintaining your Sterling Gentran:Viewpoint files.

Housekeeping procedures are described at the end of the tutorial. Maintenance procedures for deleting/archiving exceptions from Sterling Gentran:Viewpoint are summarized.

### **Exception Management Tutorial Reset**

Tutorial Reset provides instructions for resetting the tutorial.

Detailed information for all Sterling Gentran:Viewpoint screens is provided in Chapter 5, "Screen Descriptions".

To integrate Sterling Gentran:Viewpoint into your EDI processing, refer to Chapter 2, "Implementation Process".

### **Tips for setting up and using Sterling Gentran:Viewpoint.**

- Sterling Gentran:Viewpoint provides predefined tracking points for all of the Sterling Gentran:Basic and Sterling Gentran:Realtime system processes. For Sterling Gentran:Plus or Sterling Gentran:Realtime installations, Sterling Gentran:Viewpoint also provides tracking points from the Sterling Connect communications system. Your exception tracking will be from these predefined points.
- Do your business requirements analysis first. You will determine what information you want to track - this should be matched to the predefined tracking points. Also, you will want to determine what response you require for notification when an exception occurs, both system action and human action.
- It is a good idea to write several User Messages and User Procedures that clarify exceptions and enter them into the system. You can then select these messages and procedures when you are building new Exception Profiles.
- It is recommended that the first exception that you set up parallels a manual process you already do. If you set up Sterling Gentran:Viewpoint to track something you do not currently track, it may be difficult for you to know if you have completed the setup properly.

For example, you read printed Sterling Gentran reports every day looking for overdue acknowledgements. You can easily set up Sterling Gentran:Viewpoint to monitor this for you. You can use both Sterling Gentran:Viewpoint and the printed reports for a time to confirm your setup, before you move on to the next exception setup.

### Determining Exception Management Business Requirements

Five sample business requirements are provided as examples of exceptions that a company may wish to monitor. These samples represent the kind of information that would be generated from your "Determining Business Requirements" analysis.

The sample company sends purchase orders and receives invoices. In the course of doing business, your EDI staff wants to have some notification of certain exceptions that may occur during this process.

The five samples provided monitor the following exceptions:

Sample 1 - Inbound Error Rejection

Sample 2 - Outbound Mapping Errors

Sample 3 - Overdue Acknowledgements from Partners

Sample 4 - Alert when specific partner sends specific document.

Sample 5 - Alert when communications data is received from a specific mailbox.

#### Sample 1 - Inbound Error Rejection

The accounts payable department needs to be notified whenever an invoice that has been sent to them gets rejected during inbound EDI compliance checking. A FAX should be sent to the AP department as the alert when this event occurs. Also, a user message and procedure should be attached to the exception, for use by the AP clerk during resolution.

Your analysis determines that to automate this process and track using Sterling Gentran:Viewpoint you will need to set up the following:

**Recipient:** AP Department

**User Message:** "Critical Error - Rejected Invoice"

**User Procedure:**

1. Identify Partner.
2. Get Envelope Control Numbers.
3. Notify Partner to have invoice sent again.
4. Transfer this exception to the recipient: &TEDIGRP (The EDI Department) who will close this exception out.

**Capture Condition:** Acknowledgment Status = Rejected AND Transaction Set = 810

**Action:** Print FAX and send to AP Department to notify them to log on to Sterling Gentran:Viewpoint. This uses an Exception Action User Exit.

## Sample 2 - Outbound Mapping Errors

Customer relations would like to contact their trading partner when an incorrect purchase order is sent to the trading partner. A user message and procedure should be attached to the exception for use by Customer Relations. An E-Mail should be sent to MIS to notify them that a mapping error has occurred.

Your analysis determines that to automate this process and track using Sterling Gentran:Viewpoint, you will need to set up the following:

- Recipient:** Customer Relations
- User Message:** “Warning - Mapping Error Encountered”
- User Procedure:**
1. Identify Partner.
  2. Get Envelope Control Numbers.
  3. Note Mapping Errors.
  4. Notify Purchasing.
  5. Check if order was transmitted.
  6. Notify Partner if order was terminated.
- Capture Condition:** Mapping Status GT 00.
- Action:** Send E-Mail message to MIS.

## Sample 3 - Overdue Acknowledgements from Trading Partners

The EDI Group wants to be notified when Acknowledgements are overdue from their trading partners. A user message and procedure should be attached to the exception for use by the EDI Group.

Your analysis determines that to automate this process and track using Sterling Gentran:Viewpoint, you will need to set up the following:

- Recipient:** EDI Group
- User Message:** “Warning - P.O. Func.Acknowledgment overdue”
- User Procedure:**
1. Identify Partner.
  2. Call Trading Partner if more than one day overdue.
- Capture Condition:** Acknowledgment Status = O (Overdue).
- Action:** No automatic process needs to be performed.

### Sample 4 - Alert when Specific Partner Sends Specific Document

The EDI Group needs to be notified when an invoice is received from Vendor 3. A user message and procedure should be attached to the exception, for use by the EDI Group.

Your analysis determines that to automate this process and track using Sterling Gentran:Viewpoint, you will need to set up the following:

- Recipient:** EDI Group
- User Message:** “Alert - Vendor 3 now sending Invoices via EDI”
- User Procedure:**
1. Alert Accounts Payable that this partner sends invoices via EDI instead of paper.
  2. Alert Purchasing that their copy of the invoice will be delivered via MIS reports and not from the vendor directly.
- Capture Condition:** Transaction Set = 810 AND Partner = Vendor-3.
- Action:** No automatic process needs to be performed.

### Sample 5 - Alert when Communications Data is Received from a Specific Mailbox

This sample only applies to Sterling Gentran:Plus or Sterling Gentran:Realtime installations integrating communications monitoring into their Sterling Gentran:Viewpoint Exception Management processing.

The EDI Group is monitoring data from a newly installed mailbox, to confirm that the mailbox setup is correct. When data is extracted from that mailbox, the EDI Group wants to be informed through a user message. A user message should be attached to the exception for use by the EDI Group.

Your analysis determines that to automate this process and track using Sterling Gentran:Viewpoint, you will need to set up the following:

- Recipient:** EDI Group
- User Message:** “Alert - Data has been received from new mailbox”
- User Procedure:** No user procedures are required
- Capture Condition:** Remote ID = TUTORVP AND Extracted Flag = Y.
- Action:** No automatic process needs to be performed.

Step-by-step instructions are provided in the tutorial for completely setting up the first sample. It is recommended that you repeat the tutorial for the remaining samples. Sample 5 may be omitted by users without Sterling Connect systems.

## Exception Management Tutorial Setup

Before you or your staff begin the tutorial, you need to perform the following tasks:

- Set Up Logon
- Set Up Partner

Both tasks are described in detail below:

### Set Up Logon

To perform the tutorial you will need to create a User ID.

1. Log on to Sterling Gentran.
2. Select Administrative Maintenance from the Main Menu.
3. Select Security Maintenance Menu from the Administrative Main Menu.
4. Select User ID Maintenance by typing **2** and pressing **Enter**. A blank User ID Maintenance-1 Screen is displayed.
5. Enter the following:

<b>User ID:</b>		VPTUT
<b>Password:</b>		VTUT
<b>Division:</b>		000
<b>Initials:</b>		VPT
<b>Last Name:</b>		TUTORIAL
<b>First:</b>		VIEWPOINT
<b>MI:</b>		P
<b>Options</b>	<b>Access</b>	<b>Authority Level</b>
All	N	blank

6. Press **F9=Add**  
The system will display a message to re-enter the password and to confirm the add.
7. Re-enter the password and press **F9=Add**.  
The system will display a message confirming that the user was added as displayed in the following example.



```

EDIM201 4.1.2_____ USER ID MAINTENANCE-1          XXX    06/01/2011
                                                    12:00:00

User Id..... VPTUT___ Password..          Division.. 000  Initials.. VPT
Last Name.. TUTORIAL_____ First.. VIEWPOINT_____ MI.. P

Last Update Date..: 06/01/11  User..: XXX

Options                                     Access      Authority Level
Partner Maintenance                        N (Y/N)    3 (1/2/3)
Standards Maintenance                      N (Y/N)    3 (1/2/3)
Databank Maintenance                       N (Y/N)    6 (1/2/3/4/5/6)
Mapping Integration                        N (Y/N)    3 (1/2/3)
Administrative Maintenance                 N (Y/N)    3 (1/2/3)
  Security Maintenance                     N (Y/N)    3 (1/2/3)
  Message Maintenance                      N (Y/N)    3 (1/2/3)
  Configuration File Maintenance           N (Y/N)    3 (1/2/3)
  Global Parameter Maintenance             N (Y/N)    3 (1/2/3)

USER ID ADDED
Enter PF1=Help          PF3=Exit PF4=Dir          PF5=More Opts  PF6=Nxt User
                        PF9=Add PF10=Updt PF11=Del PF12=CANCL
  
```

8. Press **F5** to view more options. The User ID Maintenance-2 screen is displayed for the User Id VPTUT.

9. Enter the following:

Options	Access	Authority Level
Plus	N	blank
Control	N	blank
Realtime	N	blank
Databank Maintenance	N	blank
Viewpoint	Y	1

10. Press **F10=Updt**

The system will display a message confirming that the User Id was updated as displayed in the following example.

```

EDIM202 _____ USER ID MAINTENANCE-2          XXX    06/01/2011
                                                    12:00:00

User Id..... VPTUT

Last Update Date..: 06/01/11   User...: XXX

Options                                     Access      Authority Level
GENTRAN:Plus                               N (Y/N)    3 (1/2/3)
GENTRAN:Control                             N (Y/N)    3 (1/2/3)
GENTRAN:Realtime                           N (Y/N)    3 (1/2/3)
Realtime Databank Maintenance              N (Y/N)    6 (1/2/3/4/5/6)
Sterling Gentrans:Viewpoint                 Y (Y/N)    1 (1/2/3/4)
Recipient _____                      (optional)

USER ID UPDATED
Enter PF1=Help          PF3=Exit PF4=Prev
                        PF10=Updt
    
```

11. Press **F3=Exit** three times.  
You will be returned to the Sterling Gentrans Main Menu.

### Set Up Partners and Maps

The data for the Tutorial jobs is set up to use the same Partners and Maps that were used during the Installation Verification process that was performed during the Installation of the Sterling Gentrans:Viewpoint product.

If these Partners and/or Maps are not available, they must be reloaded before you can perform the Tutorial.

Installation jobs LOADTPM and LOADTMPR load the Partners and Maps for Partner/Qualifier and Relationship modes respectively. Refer to the *IBM® Sterling Gentrans:Viewpoint® for z/OS® Release 6.6 Installation Guide* for instructions on how to execute these jobs.

### Exception Setup

The tasks demonstrated in the tutorial for Exception Setup are:

- Selecting Tracking Points
- Defining User Messages and Procedures
- Defining Exception Capture
- Defining Exception Action
- Building Exception Profiles

The tutorial provides a complete walkthrough for setting up Sample 1. Each of these setup tasks should be repeated for the remaining samples, if applicable. Detailed information for each of the samples is provided in the tutorial.

Please note that **F1=Help** may be used at any time during the tutorial to receive additional information. Also, some fields provide a prompt function **F4=Prompt**. You may use this function to display a selection list for completing the field.

### Selecting Tracking Points

The system/process that will produce the events which form your exception must be defined to Sterling Gentran:Viewpoint as a Tracking Point. All the Tracking Points used in the tutorial are delivered with the Sterling Gentran:Viewpoint system. The following steps show you how to review a tracking point and ensure that it is enabled.

1. Sign on to Sterling Gentran using User ID: **VPTUT** and Password: **VTUT**.
2. Select Sterling Gentran:Viewpoint from the Sterling Gentran Main Menu.

```
EDIM600 9.0_____ VIEWPOINT MAIN MENU 06/01/2011

      Select one of the following.

      ___  1. System Options
          2. Extended System Management
          3. Exception Management
          4. Exception Inquiry
          5. Tracking Management
          99. Log Display

F1=Help  F3=Exit  F15=Logoff
```

The Sterling Gentran:Viewpoint Main Menu options used for exception setup tasks are Extended System Management and Exception Management.

3. Select Extended System Management from the Sterling Gentran:Viewpoint Main Menu.

```

EDIM601 9.2_____ EXTENDED SYSTEM MANAGEMENT MENU                                06/01/2011

Select one of the following.

-      1. STERLING Tracking Point Directory
       2. STERLING Tracking Point Definition
       3. Functional Area Control
       4. Maintenance/Inquiry Options Directory
       5. Maintenance/Inquiry Options Definition
       6. User Tracking Point Directory
       7. User Tracking Point Definition

F1=Help  F3=Exit
    
```

4. Select Sterling Tracking Point Directory from the Extended System Management.

```

EDIM602 9.2.1____ STERLING TRACKING POINT DIRECTORY                                06/01/2011
Type Action, press Enter.
  1=Add  4=Delete  5=Select  6=Enable  7=Disable

System CONNECT____
Process ALL_____
Status _ (E=Enabled, D=Disabled)

A System      Process  Description                               Status
- CONNECT    ALL      CONNECT GENERAL TRACKING                  E
- CONNECT    EDIR314  CONNECT OUTBOUND INTERFACE                E
- CONNECT    EDIR316  CONNECT INBOUND INTERFACE                 E
- CONNECT    MAILBOX  CONNECT COMMUNICATIONS PRODUCT            E
- CONNECT    STOUTL   CONNECT OFFLINE UTILITIES                 E
- GENTRAN    ALL      GENTRAN GENERAL TRACKING                  E
- GENTRAN    EBDI001  GENTRAN INBOUND EDITOR                    E
- GENTRAN    EBDI002  GENTRAN OUTBOUND EDITOR                   E
- GENTRAN    EBDI041  GENTRAN INBOUND MAPPER                    E
- GENTRAN    EBDI042  GENTRAN OUTBOUND MAPPER                   E
- GENTRAN    EDID205  GENTRAN OUTBOUND EDI DATABANK EXTRACT     E
- GENTRAN    EDID255  REALTIME OUTBOUND EDI DATABANK EXTRACT    E

F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel
    
```

**Note:** All of the tracking points are predefined to simplify setup.

5. Type a **5** in the Action Field next to **GENTRAN EBDI001** and press **Enter** to view the Tracking Point definition for the Sterling Gentran Inbound Editor.

```
EDIM603 9.2.2_____ STERLING TRACKING POINT DEFINITION 06/01/2011
Type Action, press Enter.
  _ 1=Add 2=Update 4=Delete

System . . . . . GENTRAN_____
Process . . . . . EBDI001_
Description . . GENTRAN_INBOUND_EDITOR_____
Item Type(s) . . : TRANSACTION, FUNCTIONAL GROUP, INTERCHANGE, RUN
Status . . . . . E (E=Enabled, D=Disabled)

Tracking Point Control
  System Message A (A=All, N=None, D=Detail)
  Status . . . . . A (A=All, N=None, D=Detail)

Order By Control
  System . . . . . Y (Y=Yes, N=No)
  Process . . . . . Y (Y=Yes, N=No)
  Values . . . . . _____ (F4=Prompt)

F1=Help F3=Exit F4=Prompt F10=FldDt1 F12=Cancel
```

The tracking point for the Inbound Editor is displayed. Ensure the status for the tracking point is **E** Enabled.

For detailed information on editing a Tracking Point Definition, refer to “EDIM603 - Sterling Tracking Point Definition Screen,” in Chapter 5, “Screen Descriptions”.

6. Press **F3=Exit** twice to return to the Sterling Gentran:Viewpoint Main Menu.



## Exception Setup

---

- Type a **1** on any **A** (Action) line and press **Enter** to display a blank User Message Definition screen.
- Enter the following information:  
User Message ID:       **U003001**  
Severity:               **S**  
Text:                   **CRITICAL ERROR -- REJECTED INVOICE**  
Explanation:           **AN INBOUND INVOICE WAS REJECTED BY THE EDI EDITOR FOR FAILURE TO PASS COMPLIANCE CHECKING.**
- Type a **1** in the Action Field to add the information you have entered, and press **Enter**. A confirmation message will be displayed. Press **Enter** again to complete the Add.

```
EDIM628 9.3.8_____ USER MESSAGE DEFINITION 06/01/2011
Type Action, press Enter
_ 1=Add 2=Update 4=Delete 8=Usage

User Message ID U003001
Severity . . . S (I=Information, W=Warning, E=Error, S=Severe, F=Fatal)

Text
CRITICAL_ERROR_--_REJECTED_____
_____

Explanation
AN_INBOUND_INVOICE_WAS_REJECTED_BY_THE_EDI_EDITOR_FOR_FAILURE_TO_PASS_____
COMPLIANCE_CHECKING._____
_____
_____
_____
_____
_____

ADD COMPLETE
F1=Help F3=Exit F12=Cancel
```

- Press **F3=Exit** to return to the Exception Management Menu.  
To enter the user messages for samples 2, 3, 4 and optionally 5, repeat steps 2 through 6 using the following information:

### Sample 2

### Outbound Mapping Errors

User Message ID:       **U003002**  
Severity:               **W**  
Text:                   **WARNING -- MAPPING ERROR ENCOUNTERED**







**Sample 2**                      **Outbound Mapping Errors**

- 3. NOTE MAPPING ERRORS**
- 4. NOTIFY PURCHASING**
- 5. CHECK IF ORDER WAS TRANSMITTED**
- 6. NOTIFY PARTNER IF ORDER WAS TRANSMITTED**

**Sample 3**                      **Overdue Acknowledgments from Partners**

Procedure:                      **UP3003**

Description:                    **HANDLE OVERDUE ACKNOWLEDGEMENTS**

Procedure:                      **1. IDENTIFY PARTNER**

- 2. CALL TRADING PARTNER IF MORE THAN 1 DAY OVERDUE**

**Sample 4**                      **Alert when Specific Partner sends Specific Document**

Procedure                        **UP3004**

Description:                    **HANDLE NEW EDI INVOICE PARTNER**

Procedure:                      **1. ALERT ACCOUNTS PAYABLE THAT THIS PARTNER SENDS INVOICES VIA EDI INSTEAD OF PAPER**

- 2. ALERT PURCHASING THAT THEIR COPY OF THE INVOICE WILL BE DELIVERED VIA MIS REPORTS AND NOT FROM THE VENDOR DIRECTLY**

You may now continue with Defining Exception Capture.

### Defining Exception Capture

The conditions that define your exception must be defined to Sterling Gentran:Viewpoint. An Exception Capture Definition needs to be defined to complete this task.

1. From the Exception Management Menu, enter a **3** to select the Exception Capture Directory.

```
EDIM623 9.3.3 _____ EXCEPTION CAPTURE DIRECTORY 06/01/2011
Type Action, press Enter
  1=Add  4=Delete  5=Select  8=Usage

System . . . CONNECT___
Process   EDIR314_
Capture ID @MODEL-CMO

A System      Process  Capture ID Description
- CONNECT    EDIR314  @MODEL-CMO CONNECT OUTBOUND INTERFACE ERRORS
- CONNECT    EDIR316  @MODEL-CMI CONNECT INBOUND INTERFACE ERRORS
- CONNECT    MAILBOX  @MODEL-CM  CONNECT ERRORS
- CONNECT    STOUTL   @MODEL-OU  CONNECT OFFLINE UTILITIES ERRORS
- GENTRAN    ALL      @MODEL-DS  ALL DOCUMENT SUSPENSE ERRORS
- GENTRAN    ALL      @MODEL-GS  ALL GROUP SUSPENSE ERRORS
- GENTRAN    ALL      @MODEL-IS  ALL INTERCHANGE SUSPENSE ERRORS
- GENTRAN    ALL      @MODEL-TS  ALL TRANSACTION SUSPENSE ERRORS
- GENTRAN    ALL      @MODEL-16  ALL FATAL ERRORS
- GENTRAN    EBDI001  @MODEL-IE  INBOUND COMPLIANCE ERRORS
- GENTRAN    EBDI002  @MODEL-OE  OUTBOUND COMPLIANCE ERRORS
- GENTRAN    EBDI041  @MODEL-IM  INBOUND MAPPING ERRORS

F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel
```

The Exception Capture Directory lists a number of models that are provided with the Sterling Gentran:Viewpoint system.

2. Type a **1** on any **A** (Action) field and press **Enter** to display the Exception Capture Definition screen to add an exception capture definition.
3. Enter the following information:

System:                   **GENTRAN**

Process:                   **EBDI001**

Capture ID:               **&TEDIREJ**

Description:               **CAPTURE REJECTED INVOICES**

User Message:             **U003001**

User Procedure:            **UP3001**

Item Type:                 **TRANSACTION**

Capture Condition:        **COMPLIANCE STATUS GT 00 AND TRANSACTION SET EQ 810**

4. Type a **1** in the Action Field to add the information you have entered and press **Enter**. A confirmation message will be displayed. Press **Enter** again to complete the Add.

```

EDIM624 9.3.4_____ EXCEPTION CAPTURE DEFINITION                                06/01/2011
Type Action, press Enter
  _ 1=Add 2=Update 4=Delete 8=Usage

System . . . GENTRAN_____
Process . . . EBDI001_____
Capture ID  &TEDIREJ_____
Description CAPTURE_REJECTED_INVOICES_____

User Message U003001 (F4=Prompt)      User Procedure UP3001_____ (F4=Prompt)

Item Type    TRANSACTION_____ (F4=Prompt)

Capture Condition (F4=Prompt)
Field        Op Value Connector
COMPLIANCE_STATUS_____ GT 00_____ AND
TRANSACTION_SET_____ EQ 810_____
_____
_____
_____
_____

ADD COMPLETE
F1=Help F3=Exit F4=Prompt F7=Bkwd F8=Fwd F12=Cancel
    
```

5. Press **F3=Exit** to return to the Exception Management Menu.  
 To enter the exception capture definitions for samples 2, 3, 4, and optionally 5, repeat steps 1 through 5 using the following information:

**Sample 2**                      **Outbound Mapping Errors**

System:                         **GENTRAN**

Process:                        **EBDI042**

Capture ID:                    **&TERROM**

Description:                   **CAPTURE OUTBOUND MAPPING ERRORS**

User Message:                 **U003002**

User Procedure:               **UP3002**

Item Type:                     **DOCUMENT**

Capture Condition:            **MAPPING STATUS GT 00**

**Sample 3**                      **Overdue Acknowledgments from Partners**

System:                         **GENTRAN**

Process:                        **EDID510**

Capture ID:                    **&TOVRDUE**

## Exception Setup

---

Description: **CAPTURE OVERDUE ACKNOWLEDGEMENTS**  
User Message: **U003003**  
User Procedure: **UP3003**  
Item Type: **FUNCTIONAL GROUP**  
Capture Condition: **ACKNOWLEDGEMENT STATUS EQ O**

**Note:** Capture Condition value is O - Overdue

**Sample 4** **Alert when Specific Partner sends Specific Document**

System: **GENTRAN**  
Process: **EBDI001**  
Capture ID: **&TNEWEDI**  
Description: **CAPTURE NEW EDI INVOICES FROM A CUSTOMER**  
User Message: **U003004**  
User Procedure: **UP3004**  
Item Type: **TRANSACTION**  
Capture Condition: **TRANSACTION SET EQ 810 AND PARTNER EQ VENDOR-3**

**Sample 5** **Alert when Communications Data is received from a Specific Mailbox**

System: **CONNECT**  
Process: **STOURL**  
Capture ID: **&TCOMMIN**  
Description: **CAPTURE INCOMING COMMUNICATIONS DATA STATUS**  
User Message: **U003005**  
User Procedure: **N/A - No user procedure required**  
Item Type: **BATCH**  
Capture Condition: **REMOTE ID EQ TUTORVP AND EXTRACTED FLAG EQ Y**

You may now continue with Defining Exception Action.



## Exception Setup

---

User Data Area:           **AN INVOICE WAS RECEIVED THAT HAS BEEN REJECTED DURING INBOUND EDI COMPLIANCE CHECKING. LOGON TO STERLING GENTRAN:VIEWPOINT FOR DETAILS.**

**Note:** The above Batch Procedure will produce a hard copy printout, not a FAX. This report lists the parameters that can be passed to other applications like FAX, E-Mail, and other systems that are available in your operations.

4. Type a **1** in the Action Field to add the information you have entered and press **Enter**. A confirmation message will be displayed. Press **Enter** again to complete the Add.

```
EDIM626 9.3.6_____ EXCEPTION ACTION DEFINITION 06/01/2011
Type Action, press Enter
  _ 1=Add 2=Update 4=Delete 8=Usage

Action . . . . &TBTFHFAX_
Description . . FAX_TO_ACCOUNTS_PAYABLE_DUE_TO_REJ_INVOICE___
Type . . . . . B (B=Batch, O=Online)
Status . . . . . E (E=Enable, D=Disable)

Batch Procedure EDIVBACT

Online TransID _____

User Data Area
  AN_INVOICE_WAS_RECEIVED_THAT_HAS_BEEN_REJECTED_DURING_INBOUND_EDI_____
  COMPLIANCE_CHECKING._LOGON_TO_VIEWPOINT_FOR_DETAILS._____
  _____
  _____

ADD COMPLETE
F1=Help F3=Exit F12=Cancel
```

5. Press **F3=Exit** to return to the Exception Management Menu.  
To enter the exception action definition for sample 2 repeat steps 1 through 5 using the following information:

<b>Sample 2</b>	<b>Outbound Mapping Errors</b>
Action:	<b>&amp;TEMAIL</b>
Description:	<b>E-MAIL MESSAGE SENT TO MIS</b>
Type:	<b>O</b>
Status:	<b>D (DISABLED - for demonstration only)</b>
Online Trans ID:	<b>MAIL</b>
User Data Area:	<b>AN ERROR WAS ENCOUNTERED MAPPING OUTBOUND DATA. CHECK LATEST EDI RUN AND CALL THE EDI GROUP TO INVESTIGATE IF MAPPING NEEDS ADJUSTMENT.</b>

You may now continue with Building Exception Profiles.



### Building Exception Profiles

Exception Profiles are used by Sterling Gentran:Viewpoint to coordinate and perform the activities you require for an exception. Defining the Exception Profile identifies to Sterling Gentran:Viewpoint what the exception is, who should be notified, and what action, if any, should be performed.

In sample 1, you are capturing rejected inbound invoices, informing the Accounts Payable Department, and generating a FAX that will alert Accounts Payable to log onto Sterling Gentran:Viewpoint and resolve the problem.

1. From the Exception Management Menu, select Exception Profile Directory (EDIM621).

```
EDIM621 9.3.1_____ EXCEPTION PROFILE DIRECTORY 06/01/2011
Type Action, press Enter
  1=Add  4=Delete  5=Select  6=Enable  7=Disable

Profile @MODEL-AR_
Status  _ (E=Enabled, D=Disabled)

A Profile      Description                                     Status
- @MODEL-AR    ACKNOWLEDGEMENT ERRORS                             E
- @MODEL-CM    COMMUNICATIONS ERRORS                                       E
- @MODEL-CMI   COMMUNICATIONS ERRORS (CONNECT INBOUND API)                 E
- @MODEL-CMO   COMMUNICATIONS ERRORS (CONNECT OUTBOUND API)                E
- @MODEL-DS    ALL DOCUMENT SUSPENSE ERRORS                                E
- @MODEL-GS    ALL GROUP SUSPENSE ERRORS                                    E
- @MODEL-IE    INBOUND COMPLIANCE ERRORS                                    E
- @MODEL-IM    INBOUND MAPPING ERRORS                                       E
- @MODEL-IS    ALL INTERCHANGE SUSPENSE ERRORS                              E
- @MODEL-OE    OUTBOUND COMPLIANCE ERRORS                                    E
- @MODEL-OEX   OUTBOUND EDI EXTRACT ERRORS                                  E
- @MODEL-OM    OUTBOUND MAPPING ERRORS                                       E
- @MODEL-OU    COMMUNICATIONS ERRORS (STOUTL)                               E

F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel
```

The Exception Profile Directory lists a number of models that are provided with the Sterling Gentran:Viewpoint system.

2. Type a **1** on any **A** (Action) field and press **Enter** to display the Exception Profile Definition screen.

3. Enter the following information:

Profile:                   **&TEDIREJ**  
 Description:               **REJECTED INVOICES**  
 Status:                   **E**  
 Capture:                  **&TEDIREJ**  
 Recipient:                **&TAPDEPT**  
 Description:               **ACCOUNTS PAYABLE DEPARTMENT**  
 CC Recipient:             **blank**  
 Description:               **blank**  
 Action:                   **&TBTCHFAX**  
 Trigger Level:            **EXCP**

4. Type a **1** in the Action Field to add the information you have entered and press **Enter**. A confirmation message will be displayed. Press **Enter** again to complete the Add.

```

EDIM622 9.3.2_____ EXCEPTION PROFILE DEFINITION 06/01/2011
Type Action, press Enter
  _ 1=Add 2=Update 4=Delete

Profile . . . . &TEDIREJ__
Description . . REJECTED_INVOICES_____
Status . . . . E (E=Enabled, D=Disabled)

Capture . . . . &TEDIREJ__ (F4=Prompt)
Description : CAPTURE REJECTED INVOICES

Recipient . . . &TAPDEPT__ (F4=Prompt)
Description . . ACCOUNTS_PAYABLE_DEPARTMENT_____

CC Recipient . _____ (F4=Prompt)
Description . . _____

Action . . . . &TBTCHFAX_ (F4=Prompt)
Description : FAX TO ACCOUNTS PAYABLE DUE TO REJ INVOICE
Trigger Level EXCP

ADD COMPLETE
F1=Help F3=Exit F4=Prompt F12=Cancel
  
```

5. Press **F3=Exit** to return to the Exception Management Menu.

To enter the exception profile definitions for the remaining samples, repeat steps 1 through 5 using the following information:

**Sample 2                   Outbound Mapping Errors**  
 Profile:                   **&TERROM**  
 Description:               **OUTBOUND MAPPING ERRORS**

## Exception Setup

---

Status: **E**  
Capture: **&TERROM**  
Recipient: **&TCUSTRLS**  
Description: **CUSTOMER RELATIONS SPECIALIST**  
CC Recipient: **blank**  
Description: **blank**  
Action: **&TEMAIL**  
Trigger Level: **EXCP**

**Sample 3** **Overdue Acknowledgments from Partners**

Profile: **&TOVRDUE**  
Description: **OVERDUE ACKNOWLEDGEMENTS**  
Status: **E**  
Capture: **&TOVRDUE**  
Recipient: **&TEDIGRP**  
Description: **EDI DEPARTMENT**  
CC Recipient: **blank**  
Description: **blank**

**Sample 4** **Alert when Specific Partner Sends Specific Document**

Profile: **&TNEWEDI**  
Description: **NEW EDI INVOICES FROM A CUSTOMER**  
Status: **E**  
Capture: **&TNEWEDI**  
Recipient: **&TEDIGRP**  
Description: **EDI DEPARTMENT**  
CC Recipient: **blank**  
Description: **blank**

<b>Sample 5</b>	<b>Alert when Communications Data is received from a Specific Mailbox.</b>
Profile:	<b>&amp;TCOMMIN</b>
Description:	<b>INCOMING COMMUNICATIONS DATA</b>
Status:	<b>E</b>
Capture:	<b>&amp;TCOMMIN</b>
Recipient:	<b>&amp;TCOMMNTR</b>
Description:	<b>COMMUNICATIONS MONITOR</b>
CC Recipient:	<b>blank</b>
Description:	<b>blank</b>

You have now completed all the exception setup tasks required for managing the five sample exceptions.

# Exception Management Tutorial Processing

## Tutorial Batch Processing

The steps provided here will cause the exceptions you have defined in Exception Setup to be produced. You will then be able to use Sterling Gentran:Viewpoint's Exception Inquiry capabilities for reviewing and responding to the exceptions created.

In normal system operation, the processing performed by these steps would be an integrated part of your every day processing. For complete details about integrating Sterling Gentran:Viewpoint into your system operations, refer to Chapter 2, "Implementation Process".

1. Configure JCL Member VPTUT200, in GENTRAN.V6X6.VPT.JCL, to your site naming standards. This is the tutorial JCL for executing the FAX exception action you defined.
2. Configure, then submit JCL VPTUT010. This will load the JCL member VPTUT200 into the VSAM Online JCL (EDIJCL) file. This will complete your batch setup for the batch procedure EDIVBACT, which corresponds to the exception action &TBTCHFAX.
3. **For users without the Sterling Connect system**, the JCL in member VPTUTOUT, from the GENTRAN.V6X6.VPT.JCL library, should be configured and submitted. This runs the outbound processes in Sterling Gentran using the tutorial data.

**Note:** If you are processing in Partner Relationship mode, you need to comment out the SYS095 DD statements for the Partner Cross Reference file and uncomment the EDIPREL DD statements for the Partner Relationship file.

Also, you need to modify the second parameter record in SYS001 for EBDI042 to assign "YOUR COMPANY" as the Default User ID starting in position 40.

**For users with Sterling Connect**, the JCL in member VPTUTOPL from the GENTRAN.V6X6.VPT.JCL library should be configured and submitted for processing. This runs the outbound processes in Sterling Gentran and the Sterling Connect Offline Utilities using the tutorial data.

**Note:** If you are processing in Partner Relationship mode, you need to comment out the SYS095 DD statements for the Partner Cross Reference file and uncomment the EDIPREL DD statements for the Partner Relationship file.

Also, you need to modify the second parameter record in SYS001 for EBDI042 to assign "YOUR COMPANY" as the Default User ID starting in position 40.

4. **For users without the Sterling Connect system**, the JCL in member VPTUTIN from the GENTRAN.V6X6.VPT.JCL library should be configured and submitted for processing. This runs the inbound processes in Sterling Gentran using the tutorial data.

**Note:** If you are processing in Partner Relationship mode, you need to comment out the SYS095 DD statements for the Partner Cross Reference file and uncomment the EDIPREL DD statements for the Partner Relationship file.

**For users with Sterling Connect,** the JCL in member VPTUTIPL from the GENTRAN.V6X6.VPT.JCL library should be configured and submitted for processing. This runs the inbound processes in Sterling Gentran and the Sterling Connect Offline Utilities using the tutorial data.

**Note:** If you are processing in Partner Relationship mode, you need to comment out the SYS095 DD statements for the Partner Cross Reference file and uncomment the EDIPREL DD statements for the Partner Relationship file.

**Note:** In order to run the VPTUTIPL job, ensure that the Sterling Gentran:Viewpoint tutorial data has been added successfully to the Sterling Connect Data Queues using the LOADVPPL JCL member. If the data is not available, JCL member LOADVPPL should be submitted for processing prior to running VPTUTIPL.

5. After these jobs finish, data from Sterling Gentran and optionally Sterling Connect will now reside in the Sterling Gentran:Viewpoint Staging area.
6. From CICS, enter the task code **EDIV** to start the Sterling Gentran:Viewpoint scanner. This will trigger the Sterling Gentran:Viewpoint Post Processor to move the data from the Sterling Gentran:Viewpoint Staging area to the Sterling Gentran:Viewpoint Repository.

**Note:** The response “Viewpoint Scanner Started” is displayed by **EDIV**. To verify the Sterling Gentran:Viewpoint scanner start up, select Log Display from the Sterling Gentran:Viewpoint Main Menu.

**Note:** If you are using system image, replace EDI with your system image characters.

You may now continue with the tutorial at Exception Inquiry.

### Exception Inquiry

The system has been set up and now you are ready for the daily tasks. Exception Inquiry tasks provides you with an idea of the direct benefits provided by Sterling Gentran:Viewpoint.

This tutorial example will walk step-by-step through sample 1. The following tasks should be performed:

- Reviewing Exceptions
- Transferring Exceptions
- Closing Exceptions
- Deleting Exceptions

These tasks demonstrate how to use Exception Inquiry to review and respond to exceptions that have been captured for you by Sterling Gentran:Viewpoint.

### Reviewing Exceptions

At selected times during the day, you will check to see if you have any exceptions.

Sterling Gentran:Viewpoint can be configured to actively notify you by using the Exception Action User Exit. This user exit is particularly useful when combined with E-Mail or paging systems.

In sample 1, “Inbound Error Rejection,” you are a staff accountant in Accounts Payable who receives a FAX. This FAX was initiated by the Sterling Gentran:Viewpoint system and indicates that an inbound invoice has been rejected by Sterling Gentran.

FAX INITIATED BY VIEWPOINT

FAX TO: ACCOUNTS PAYABLE DUE TO REJECTED INVOICE

AN INVOICE WAS RECEIVED THAT HAS BEEN REJECTED DURING INBOUND EDI COMPLIANCE CHECKING.

LOG ON TO VIEWPOINT FOR DETAILS. SEE RECIPIENT &TAPDEPT.

**Note:** The above figure is a simulated FAX. Sample 1 in the tutorial was set up to initiate the batch procedure EDIVBACT. Check this batch output for a complete list of the information that is available to user batch and online systems when the rejected inbound invoice was rejected for sample 1.

Sample programs are provided with the Sterling Gentran:Viewpoint system for passing information to a batch or online system, like a FAX or E-Mail system. For detailed information about implementing Exception Actions, refer to “Optional Features” and to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 4, “User Exits and APIs”.

1. Select Exception Inquiry from the Sterling Gentran:Viewpoint Main Menu.

```

EDIM645 9.4_____ EXCEPTION INQUIRY MENU 06/01/2011

Select one of the following.

_ 1. Recipient Directory
_ 2. Exception List

F1=Help F3=Exit

```

2. Select the Recipient Directory. This directory displays the Sterling Gentran:Viewpoint recipients.

```

EDIM646 9.4.1_____ RECIPIENT DIRECTORY 06/01/2011
Type Action, press Enter. 12:00:00
4=Delete 5=Select 6=ExcpList

Recipient &TAPDEPT__

A Recipient Description Excp Last Activity
Count Date Time
_ &TAPDEPT ACCOUNTS PAYABLE DEPARTMENT 00001 06/01/2011 12:00
_ &TCOMMNR COMMUNICATIONS MONITOR 00000 06/01/2011 12:00
_ &TCUSTRLS CUSTOMER RELATIONS SPECIALIST 00000 06/01/2011 12:00
_ &TEDIGRP EDI DEPARTMENT 00000 06/01/2011 12:00
_ @ACKREC ACKNOWLEDGEMENT RECONCILIATION ERRORS 00000 00/00/0000 00:00
_ @COMM-ERRS COMMUNICATIONS MONITOR 00000 00/00/0000 00:00
_ @EDITORS EDI COMPLIANCE MONITOR 00002 06/01/2011 12:00
_ @FATAL FATAL ERRORS 00000 00/00/0000 00:00
_ @MAPPERIN INBOUND MAPPING ERRORS 00002 06/01/2011 12:00
_ @MAPPEROUT OUTBOUND MAPPING ERRORS 00001 06/01/2011 12:00
_ @SUSPENSE SUSPENSE ERRORS 00000 00/00/0000 00:00
_
_
LAST ENTRY DISPLAYED
F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel Enter=Refresh

```

All active Sterling Gentran:Viewpoint recipients are displayed with the number of exceptions currently being monitored by Sterling Gentran:Viewpoint for them.





5. Select the exception by typing **5** in the Action Field and pressing **Enter**.

The Exception Detail Screen will be displayed for the exception.

```

EDIM649 _____ EXCEPTION DETAIL 06/01/2011
Type Action, press Enter.
  __ 4=Delete 6=MsgList 7=Data 8=UserMsg 9=UserProc 10=ExcpHist 11=Recip.

Recipient . . . : &TAPDEPT  ACCOUNTS PAYABLE DEPARTMENT
Excp Status . . : OPEN 06/01/2011 12:00
Excp Tag . . . : 0000000047
User Reference: 000000237 /000000091 /000025056

System/Process: GENTRAN /EBDI001 Excp. Action: &TBTCHEFAX
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm: 06/01/2011-12:00
Capture ID. . . : &TEDIREJ Databank: GENTRAN
Description . . : CAPTURE REJECTED INVOICES

Application : Interchange: 000000237
Network . . . : Group: 000000091
Direction/Set : INBOUND /810 Trans: 000025056
Partner . . . : VENDOR-1
Qual . . . . :

F1=Help F3=Exit F6=Next F12=Cancel

```

This screen displays important information about the exception, its status, when it occurred, what the system did in response, when it responded, and other information.

From this information you can determine the basic information about the exception:

- Who is the partner?
- What document?
- What went wrong?

In this part of the example, you are the Accounts Payable staff accountant. You can tell that the problem is definitely EDI related and you need to know what steps to follow next.

6. Enter an **8** in the Action Field and press **Enter**.  
The User Message Display screen is displayed.

```
EDIM662 _____ USER MESSAGE DISPLAY 06/01/2011
Type Action, Press Enter.
  __ 6=Excp 7=MsgList 8=Data 9=UserProc 10=ExcpHist

Reference : 000000237 /000000091 /000025056
Excp Tag : 0000000047
Description: CAPTURE REJECTED INVOICES

Message
  U-003001 CRITICAL ERROR -- REJECTED

Explanation
  AN INBOUND INVOICE WAS REJECTED BY THE EDI EDITOR FOR FAILURE TO PASS
  COMPLIANCE CHECKING.

F1=Help F3=Exit F12=Cancel
```

This screen contains a message that was created to explain the exception. This message was set up by you or someone on your staff when setting up the exception profile for this exception, in order to make it easier to understand and respond to this exception. These messages are *not* created by the Sterling Gentran:Viewpoint system.

7. Enter a **9** in the Action Field and press **Enter**.  
The User Procedure Display is displayed.

```
EDIM663 _____ USER PROCEDURE DISPLAY 06/01/2011
Type Action, Press Enter.
  __ 6=Excp 7=MsgList 8=Data 9=UserMsg 10=ExcpHist

Procedure : UP3001
Description: HANDLE REJECTED INVOICES

Procedure
  1. IDENTIFY PARTNER
  2. GET ENVELOPE CONTROL NUMBERS
  3. NOTIFY PARTNER TO HAVE INVOICE SENT AGAIN
  4. TRANSFER THIS EXCEPTION TO THE RECIPIENT &TEDIGRP (EDI GROUP) WHO WILL
     CLOSE THIS EXCEPTION OUT

F1=Help F3=Exit F12=Cancel
```

This screen contains a procedure which is made up of a series of steps that you will need to follow to respond to the exception. This procedure was set up by you or someone on your staff to make it easier to understand and respond to this exception. These procedures are *not* created by the Sterling Gentran:Viewpoint system. The procedures listed do not represent any system action by Sterling Gentran:Viewpoint. These procedures require human action, not system processing procedures.

8. Enter a **7** in the Action Field and press **Enter**.

The Exception Message List is displayed.

```

EDIM650 _____ EXCEPTION MESSAGE LIST 06/01/2011
Type Action, press Enter.
  6=Excp  7=Data  8=UserMsg  9=UserProc 10=ExcpHist

System   : GENTRAN
Process  : EBDI001
Desc.    : CAPTURE REJECTED INVOICES
Reference: 000000237 /000000091 /000025056

A Message
___ U-003001 CRITICAL ERROR -- REJECTED
___ 62 16 BIG 1 MISSING INDICATED MANDATORY ELE
   MENT.
___ 63 19 REF 1 IN THE IDENTIFIED ELEMENT, AN I
   NVALID CODE WAS FOUND.
___ 62 21 N1 1 MISSING INDICATED MANDATORY ELE
   MENT.
___ 63 25 IT1 3 QQ IN THE IDENTIFIED ELEMENT, AN I
   NVALID CODE WAS FOUND.
___ 62 28 CTT 1 MISSING INDICATED MANDATORY ELE
   MENT.

F1=Help F3=Exit F6=Next F7=Bkwd F8=Fwd F12=Cancel

```

This screen displays the messages produced by Sterling Gentran for the exception as it was being processed by the Inbound Editor (EBDI001).

9. Enter **7** in the Action Field, in the first line of the message list, and press **Enter**.  
The Exception Data Display screen is displayed for the exception.

```
EDIM651 _____ EXCEPTION DATA DISPLAY 06/01/2011
Type Action, press Enter.
  __ 6=Excp 7=MsgList 8=UserMsg 9=UserProc 10=ExcpHist

System   : GENTRAN
Process  : EBDI001
Desc.    : CAPTURE REJECTED INVOICES
Reference: 000000237 /000000091 /000025056

Exception Data
*U-003001 CRITICAL ERROR -- REJECTED
  ST*810*000025056?
  BIG**INV56*20020731*PONUMBER-056?
*   62   16 BIG   1                               MISSING INDICATED MANDATORY ELEME
*
  NT.
NTE**-----?
NTE**          TERMS ARE SPECIFIED BELOW?
NTE** DISCOUNT WILL NOT BE APPLIED UNLESS INVOICE IS PAID?
NTE** IN FULL BY THE DISCOUNT DUE DATE.?
NTE**-----?
REF* *00547?

F1=Help  F3=Exit  F6=Next  F7=Bkwd  F8=Fwd  F12=Cancel
```

This screen displays the actual data for the exception. All messages generated for the exception from the message list are inserted into the data. The messages inserted in the data are indicated with an "\*" in the first position of each line on the display.

If necessary, you can examine the data using this screen to determine what the specific problem was and how to correct it. For this example, a "missing indicated mandatory element" caused the error.

You may use the **F8=Fwd** key to page through the data or skip through the messages using the **F6=Next** key. You will find that a missing mandatory element (BIG01 - Invoice Date) caused the error.

10. Press **F3=Exit** to return to the Exception Inquiry Menu.

## Transferring Exceptions

As staff accountant in Accounts Payable, you have now determined from the steps followed above what went wrong and discovered that the problem is EDI related (not accounting). You want to transfer the exception to the EDI staff for them to resolve the problem.

1. From the Exception Inquiry Menu, enter a **1** to select the Recipient Directory.
2. Find recipient &TAPDEPT and type **6** in the Action field for this recipient. Press **Enter**. The Exception List screen will be displayed.
3. Position your cursor to the exception you wish to transfer, type **10** in the Action Field for the exception, and press **Enter**.

The Exception History screen will be displayed.

```

EDIM652 _____ EXCEPTION HISTORY 06/01/2011
Type Action, Press Enter.
_ 6=Excp 7=Data 8=MsgList 9=HistUpdt

Reference . . . : 000000237 /000000091 /000025056
Current Status : OPEN
Date-Time . . . : 06/01/2011 - 12:00

Status . . . . . :
Update Initials:
Date-Time . . . : -
Recipient . . . :

Note . . . . . :

LAST ENTRY DISPLAYED
F1=Help F3=Exit F6=Next F8=Fwd F12=Cancel

```

From this screen you may scroll through a running history for the exception.

4. Type **9** in the Action Field, and press **Enter** to display the Exception History Update screen.

## Exception Inquiry

---

5. Type **T** in the Status Field and type **&TEDIGRP** in the Recipient field. Type the following note in the **NOTE** field:

HAVE ASKED PARTNER TO RESEND INVOICE.

NOTIFIED EDI DEPARTMENT OF REJECTED INVOICE.

Type a **2** in the Action Field and press **Enter** to update the exception. The system will display a confirmation message. Press **Enter** again to complete the update.

```
EDIM654 _____ EXCEPTION HISTORY UPDATE 06/01/2011
Type Action, Press Enter.
  _ 2=Update

Reference . . . : 000000237      /000000091      /000025056
Current Status : OPEN
Date-Time . . . : 06/01/2011 - 12:00

Status . . . . . T (C=Close, R=Review, T=Transfer)
Update Initials: VPT TUTORIAL
Date-Time . . . : 06/01/2011 - 12:00
Recipient . . . &TEDIGRP__ (F4=Prompt)
Description . . EDI DEPARTMENT

Note . . . . . HAVE ASKED PARTNER TO RESEND INVOICE. _____
                NOTIFIED EDI DEPARTMENT OF REJECTED INVOICE. _____
                _____
                _____

UPDATE COMPLETE
F1=Help F3=Exit F4=Prompt F12=Cancel
```

6. Press **F3=Exit** to return to the Exception Inquiry Menu.

This process will transfer the exception from Accounts Payable to the EDI Department. The next steps would be followed by the recipient that the exception was transferred to, EDI Group (&TEDIGRP).

## Closing Exceptions

When you are satisfied the exception has been clearly identified and resolved, you are ready to close the exception.

1. From the Exception Inquiry Menu, enter a **1** to select Recipient Directory.

```

EDIM646 9.4.1_____ RECIPIENT DIRECTORY 06/01/2011
Type Action, press Enter. 12:00:00
 4=Delete 5=Select 6=ExcpList

Recipient &TAPDEPT__

A Recipient Description Excp Last Activity
Count Date Time
- &TAPDEPT ACCOUNTS PAYABLE DEPARTMENT 00000 06/01/2011 12:00
- &TCOMMNR COMMUNICATIONS MONITOR 00000 06/01/2011 12:00
- &TCUSTRLS CUSTOMER RELATIONS SPECIALIST 00000 06/01/2011 12:00
- &TEDIGRP EDI DEPARTMENT 00001 06/01/2011 12:00
- @ACKREC ACKNOWLEDGEMENT RECONCILIATION ERRORS 00000 00/00/0000 00:00
- @COMM-ERRS COMMUNICATIONS MONITOR 00000 00/00/0000 00:00
- @EDITORS EDI COMPLIANCE MONITOR 00002 06/01/2011 12:00
- @FATAL FATAL ERRORS 00000 00/00/0000 00:00
- @MAPPERIN INBOUND MAPPING ERRORS 00002 06/01/2011 12:00
- @MAPPEROUT OUTBOUND MAPPING ERRORS 00001 06/01/2011 12:00
- @SUSPENSE SUSPENSE ERRORS 00000 00/00/0000 00:00
-
-
LAST ENTRY DISPLAYED
F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel Enter=Refresh

```

From this display you will notice that the recipient &TEDIGRP has 1 active exception with a last activity date and time that reflects the transfer that was just performed for the rejected invoice exception. Also, notice that the recipient &TAPDEPT no longer has any outstanding exceptions.





This screen displays the current status for the exception and any note that was entered on the last history entry.

4. Type **9** in the Action Field, and press **Enter** to display the Exception History Update screen.
5. Type **C** in the Status Field to close the exception and type the following note in the Note field:  
 CLOSED EXCEPTION - PROBLEM RESOLVED
6. Type **2** in the Action Field and press **Enter** to update the exception. The system will display a confirmation message. Press **Enter** again to confirm the update.

```

EDIM654 _____ EXCEPTION HISTORY UPDATE 06/01/2011
Type Action, Press Enter.
  _ 2=Update

Reference . . . : 000000237      /000000091      /000025056
Current Status : TRANSFER
Date-Time . . . : 06/01/2011 - 12:00

Status . . . . . C (C=Close, R=Review, T=Transfer)
Update Initials: VPT TUTORIAL
Date-Time . . . : 06/01/2011 - 12:00
Recipient . . . _____ (F4=Prompt)
Description . .

Note . . . . . CLOSED_EXCEPTION_-_PROBLEM_RESOLVED_____
_____
_____
_____

UPDATE COMPLETE
F1=Help F3=Exit F4=Prompt F12=Cancel
    
```

7. Press **F12=Cancel** to return to the Exception History screen.

```
EDIM652 _____ EXCEPTION HISTORY 06/01/2011
Type Action, Press Enter.
_ 6=Excp 7=Data 8=MsgList 9=HistUpdt

Reference . . . : 000000237 /000000091 /000025056
Current Status : CLOSED
Date-Time . . . : 06/01/2011 - 12:00

Status . . . . : CLOSED
Update Initials: VPT TUTORIAL
Date-Time . . . : 06/01/2011 - 12:00
Recipient . . . :

Note . . . . . : CLOSED EXCEPTION - PROBLEM RESOLVED

F1=Help F3=Exit F6=Next F8=Fwd F12=Cancel
```

The exception is displayed with a status of **Closed**. The **User Initials** of the person who closed the exception and the **Date-Time** it was closed is also displayed.

8. Press **F8=Fwd** to view the previous history entries for the exception.

```
EDIM653 _____ EXCEPTION HISTORY 06/01/2011
Type Action, Press Enter.
_ 6=Excp 7=Data 8=MsgList 9=HistUpdt

Status . . . . : TRANSFER Date-Time: 06/01/2011 - 12:00
Update Initials: VPT TUTORIAL
Recipient . . . : &TEDIGRP EDI DEPARTMENT
Note . . . . . : HAVE ASKED PARTNER TO RESEND INVOICE.
NOTIFIED EDI DEPARTMENT OF REJECTED INVOICE.

Status . . . . : Date-Time: -
Update Initials:
Recipient . . . :
Note . . . . . :

LAST ENTRY DISPLAYED
F1=Help F3=Exit F6=Next F7=Bkwd F8=Fwd F12=Cancel
```

9. Press **F12=Cancel** to return to the Exception List screen.



### Requesting Exception Management Reports

Although Sterling Gentran:Viewpoint automates the tasks of monitoring your EDI processing, there may still be instances when reports will need to be generated. The Sterling Gentran:Viewpoint Maintenance/Inquiry feature allows you to specify the type of information you want reported.

For detailed information about the wide range of selection criteria available, refer to the "Selection Criteria Reference Chart" in Chapter 5, "Screen Descriptions".

In this example, the EDI manager wants to know how many Sterling Gentran:Viewpoint Exceptions are outstanding.

#### Creating an Inquiry Definition

1. From the Sterling Gentran:Viewpoint Main Menu, select Extended System Management.
2. From the Extended System Management Menu, select Maintenance/Inquiry Options Directory. The Maintenance/Inquiry Options Directory screen will be displayed.

```
EDIM608 9.2.4 _____ MAINTENANCE/INQUIRY OPTIONS DIRECTORY 06/01/2011
Type Action, press Enter
  1=Add  4=Delete  5=Select  6=Enable  7=Disable

File . . . _ (R=Repository, P=Profile)
Identifier @MODEL-MT1
Status . . _ (E=Enabled, D=Disabled)

A Identifier Description File Status
- @MODEL-MT1 REPOSITORY MAINTENANCE - EXCEPTIONS REPOSITORY E
- @MODEL-MT2 REPOSITORY MAINTENANCE - TRACKING REPOSITORY E
- @MODEL-MT3 PROFILE MAINTENANCE - EXCEPTIONS PROFILE E
- @MODEL-MT4 PROFILE MAINTENANCE - TRACKING PROFILE E
- @MODEL-MT5 PROFILE MAINTENANCE - SYSTEM PROFILE E
- @MODEL-P LIST ALL EXCEPTION PROFILES PROFILE E
- @MODEL-R LIST EXCEPTIONS FOR PARTNER VENDOR-1 REPOSITORY E
- @MODEL-TP LIST ALL USER TRACKING POINTS PROFILE E
- @MODEL-TR LIST ALL TRACKED ITEMS FOR VENDOR-2 REPOSITORY E
-
-
-
LAST ENTRY DISPLAYED
F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel
```

The Maintenance/Inquiry Options Directory lists a number of models that are provided with the Sterling Gentran:Viewpoint system.

3. Type a **1** on any **A** (Action) field and press **Enter** to display the Maintenance/Inquiry Options Definition Screen.
4. Enter the following information:

Identifier:                   **&TACTVEXCP**  
Description:                 **EXCEPTIONS ACTIVE (NOT CLOSED) IN VIEWPOINT**  
Status:                       **E**

File: **REPOSITORY**  
 Mode: **INQUIRY**  
 Class: **EXCEPTIONS**  
 Report Level: **BOTH**  
 Selection Criteria: **EXCEPTION STATUS NE CLOSED**

5. Type a **1** in the Action field and press **Enter**. The system will display a confirmation message. Press **Enter** again to confirm the ADD.

```

EDIM609 9.2.5_____ MAINTENANCE/INQUIRY OPTIONS DEFINITION 06/01/2011
Type Action, press Enter.
_ 1=Add 2=Update 4=Delete

Identifier &TACTVEXCP
Description EXCEPTIONS_ACTIVE_(NOT_CLOSED)_IN_VIEWPOINT__
Status . . . E (E=Enabled, D=Disabled)

Operation (F4=Prompt)
File . . . REPOSITORY Class . . . EXCEPTIONS
Mode . . . INQUIRY Report Level BOTH__

Selection Criteria (F4=Prompt)
Field Op Value Con.
EXCEPTION_STATUS__ NE CLOSED_____
_____ -- _____
_____ -- _____
_____ -- _____
_____ -- _____
_____ -- _____

ADD COMPLETE
F1=Help F3=Exit F4=Prompt F12=Cancel
  
```

6. Press **F3=Exit** twice to return to the Sterling Gentran:Viewpoint main menu.

## Generating Reports

The report is generated by running the batch procedure, Maintenance/Inquiry (EDIN140), and specifying the Inquiry Definition Identifier **&TACTVEXCP** that was just created. This job may be included in your daily job stream.

Refer to Chapter 5, “Screen Descriptions” for detailed information about “EDIM609 - Maintenance/Inquiry Options Definition Screen” and to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 1, “Batch Program Descriptions” for detailed information about the “EDIN140 - Maintenance/Inquiry” batch program.

Sterling Gentran:Viewpoint is delivered with several models for Maintenance/Inquiry. You may want to review these from the Maintenance/Inquiry Directory and build maintenance criteria and special reports for your specific needs.

### Exception Management Housekeeping

Periodic maintenance should be performed on your Sterling Gentran:Viewpoint system. For example, you may decide to delete exceptions that have been closed for five days or longer.

#### Creating a Maintenance Definition

Follow these steps to create a definition that purges closed and deleted exceptions. When the scheduled processing of the maintenance JCL occurs, the purge will occur.

1. From the Sterling Gentran:Viewpoint Main Menu, select Extended System Management.
2. From the Extended System Management Menu, select Maintenance/Inquiry Options Definition. The Maintenance/Inquiry Options Definition screen will be displayed.
3. Enter the following information:

Identifier:	<b>&amp;TCLITMDLT</b>
Description:	<b>DELETE EXCEPTIONS CLOSED OVER 5 DAYS</b>
Status:	<b>E</b>
File:	<b>REPOSITORY</b>
Mode:	<b>PURGE</b>
Class:	<b>EXCEPTIONS</b>
Report Level:	<b>BOTH</b>
Selection Criteria:	<b>AGE CLOSED GT 005 OR ONLINE DELETES EQ YES</b>
4. Enter a **1** in the Action field and press **Enter**. The system will display a confirmation message. Press **Enter** again to confirm the ADD.
5. Press **F3=Exit** twice to return to the Sterling Gentran:Viewpoint Main Menu.

#### Performing File Maintenance

The exceptions will be purged, and optionally archived, by running the batch procedure Maintenance/Inquiry (EDIN140) and specifying the Maintenance Definition Identifier **&TCLITMDLT** that was just created. This job may be included in your daily job stream.

Refer to Chapter 5, “Screen Descriptions” for detailed information about “EDIM609 - Maintenance/Inquiry Options Definition Screen” and to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 1, “Batch Program Descriptions” for detailed information about the “EDIN140 - Maintenance/Inquiry” batch program.

Sterling Gentran:Viewpoint is delivered with several models for Maintenance/Inquiry. You may want to review these from the Maintenance/Inquiry Directory and build maintenance criteria and special reports for your specific needs.

## Exception Management Tutorial Reset

### Tutorial Reset Instructions

You may reset the tutorial by using the Sterling Gentran:Viewpoint Maintenance/Inquiry feature to purge the tutorial data from the repository.

```

EDIM609 9.2.5_____ MAINTENANCE/INQUIRY OPTIONS DEFINITION      06/01/2011
Type Action, press Enter.
  _ 1=Add 2=Update 4=Delete

Identifier  ANYNAME_____
Description PURGE_TUTORIAL_DATA_FROM_REPOSITORY_____
Status . . . E (E=Enabled, D=Disabled)

Operation (F4=Prompt)
  File . . . REPOSITORY          Class . . . EXCEPTIONS
  Mode . . . PURGE_____       Report Level BOTH__

Selection Criteria (F4=Prompt)
  Field          Op  Value                                     Con.
  RECIPIENT_NAME EQ  &TAPDEPT_____                       OR_
  RECIPIENT_NAME EQ  &TCUSTRLS_____                       OR_
  RECIPIENT_NAME EQ  &TEDIGRP_____                       OR_
  RECIPIENT_NAME EQ  &TCOMMNTR_____                       ___
  _____      ___  _____
  _____      ___  _____
  _____      ___  _____

F1=Help  F3=Exit  F4=Prompt  F12=Cancel

```

1. Create an Online Maintenance/Inquiry Options Definition with the following information:

File: **REPOSITORY**

Mode: **PURGE**

Class: **EXCEPTIONS**

Selection Criteria: **RECIPIENT NAME EQ &TAPDEPT OR  
RECIPIENT NAME EQ &TCUSTRLS OR  
RECIPIENT NAME EQ &TEDIGRP OR  
RECIPIENT NAME EQ &TCOMMNTR**

2. Run the batch job EDIN140, specifying the Maintenance definition identifier just created. This will delete the tutorial data from the Sterling Gentran:Viewpoint Repository.

**Note:** The definitions and profiles defined in the Exception Setup portion of the tutorial are still enabled for capturing exceptions. To remove these, you should mark them for deletion using the Exception Management Menu options.

#### Caution to the EDI Coordinator:

Use caution running any tutorial or practice data in a production environment. It is a good idea to use the tutorial naming convention (&T...), used in the tutorial, to ensure that sample data will not interfere with live data.



# Tracking Management Tutorial

**This Tutorial is only available if the Tracking Management module is installed.** This Tutorial will demonstrate how to perform the basic tasks required to use the Sterling Gentran:Viewpoint Tracking Management functions. By navigating through the Sterling Gentran:Viewpoint screens and performing common tasks, you will become acquainted with the functions used to track items through the extended EDI system, as well as how Tracking and Exception Management may be used together.

It is recommended that you read Chapter 1, "Product Description" before performing the tutorial. The Product Description will familiarize you with the features, concepts and terminology of Sterling Gentran:Viewpoint. You may also refer to the "Glossary".

Also, if you have not already performed the tutorial for Exception Management, it is recommended that you complete that tutorial up to the point of transferring or closing any exceptions. You will close an exception during the Tracking Management Tutorial. Refer to the "Exception Management Tutorial" at the beginning of this chapter.

Using Sterling Gentran:Viewpoint to track items (for example, documents) can be described in the following procedures:

### **Determining Tracking Management Business Requirements**

The first step in determining how you will use Tracking Management, is to analyze how you operate in respect to day-to-day tasks, determine those situations where you need to find out what happened to particular documents (that is, their status and history), and how you identify those documents.

An example may be that you have a customer help desk where you try and answer customer questions about particular documents, such as purchase orders or invoices. This is similar to the sample scenario that is presented in this tutorial.

### **Tracking Management Tutorial Setup**

Tutorial Setup provides instructions for setting up the tutorial.

### **Tracking Setup**

Tracking Setup involves the steps needed to implement tracking for business requirements that you have determined. This may include enabling user applications to pass information to Sterling Gentran:Viewpoint.

### **Tracking Management Tutorial Processing**

Tutorial Processing provides instructions for the tutorial batch processing.

### **Tracking Query Requests**

The Query Request function, with Tracking Management, provides the user with an interactive approach to finding and displaying the status and history of items as they move through the extended EDI system.

### **Tracking Management Reports**

A wide range of reporting criteria and procedures for requesting and printing reports are provided.

### **Tracking Management Housekeeping**

Housekeeping provides operational flexibility for maintaining your Sterling Gentran:Viewpoint files.

Housekeeping procedures are described at the end of the tutorial. Maintenance procedures for deleting/archiving tracking information from Sterling Gentran:Viewpoint files, are summarized.

### **Tracking Management Tutorial Reset**

Tutorial Reset provides instructions for resetting the tutorial setup.

Detailed information for all Sterling Gentran:Viewpoint screens is provided in Chapter 5, "Screen Descriptions". Chapter 2, "Implementation Process" describes strategies for implementing both Tracking Management and Exception Management in your environment.

### **Tips for setting up and using Sterling Gentran:Viewpoint Tracking Management.**

1. Sterling Gentran:Viewpoint provides predefined tracking points for most of the Sterling Gentran:Basic system processes. For Sterling Gentran:Plus or Sterling Gentran:Realtime installations, Sterling Gentran:Viewpoint also provides tracking points from the Sterling Connect communications system. Tracking Management is automatically enabled for these processes. This may be appropriate for your site and means you can immediately start tracking items within the translation, communications, network, and trading partner portions of the extended EDI system.
2. Do your business requirements analysis first. You will need to determine what information you want to track, including information from user applications. Enabling user applications for tracking requires changes to those applications and therefore programming resources.
3. Setting up meaningful user references, through the Sterling Gentran system, is recommended so that you may query on identifiers that are known to your users, such as a purchase order number. This involves identifying these references on application definitions, and with the message standard tables.

### **IMPORTANT**

Prior to completing the entire tutorial, the following steps must be performed:

1. Review "Determining Tracking Management Business Requirements" provided below.
2. Perform the Exception Management Tutorial up to the point of transferring or closing exceptions. You will not need to run the batch processes for the Exception Management Tutorial again, but you must ensure that the Exception Profiles are set up as shown in that tutorial.

### Determining Tracking Management Business Requirements

The objective of Tracking Management is to provide immediate information (that is, status and history) about items as they move through the extended EDI system. The term "item type" refers to the form of data as it proceeds through processes. For example, an outbound "document" item type becomes a "transaction," which is part of a "functional group," which in turn is part of an "interchange," which is then part of a communications "batch".

A typical use of the Tracking Management function is in a customer service role. This tutorial describes this scenario. Tracking Management can also be used in an operational manner, such as ensuring that documents were received and processed from a particular partner every Tuesday afternoon.

As a background for this tutorial, the following description is provided:

- Your company trades with a company called VENDOR-1. You purchase goods from them and receive invoices. Your company automatically pays the bills upon receipt of the invoice, and there is usually no gap in payments unless there is a problem with the invoice.
- You have installed Tracking Management in addition to Exception Management. You have already set up Sterling Gentrans and Sterling Connect Tracking Points, Captures, and Profiles to handle your business needs. You have decided to include your outbound Purchase Order application, outbound communications, inbound communications and inbound Invoice application in the Extended EDI stream to be tracked. These User Applications can be monitored with Tracking Management only.

To summarize, the Tracking Management tutorial details sample customer service situations and provides information for the following concerns:

- Sample 1 - View all orders sent in a given time period
- Sample 2 - View the history of an outbound purchase order
- Sample 3 - Verify acknowledgement with reject status was sent to customer
- Sample 4 - Verify inbound invoice rejected and pinpoint error for customer

In addition, procedures to create reports and file maintenance jobs are also presented.

---

## Tracking Management Tutorial Setup

### Tutorial Setup

Before you or your staff begin the tutorial, you need to perform some simple setup tasks. These tasks may have already been completed with the Exception Management tutorial. Please refer to "Exception Management Tutorial Setup" earlier in this chapter.

As described in the Exception Management **Tutorial Setup**, there are two tasks to complete:

1. **Set Up Logon**

Logon Setup creates a "tutorial user" which may be used to perform the tutorial.

2. **Set Up Partners and Maps**

Partner Setup ensures that the required Partners and Maps are available.

You must ensure that this setup is completed in order for the tutorial data to process.

### Tracking Setup

Tracking Setup covers the task of defining and enabling user tracking points, or user applications. A detailed explanation of enabling user applications to pass information to Sterling Gentran:Viewpoint Tracking Management is provided in the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 4, "User Exits and APIs".

Please note that **F1=Help** may be used at any time during the tutorial to receive additional information. Also, some fields provide a prompt function **F4=Prompt**. You may use this function to display a selection list for completing the field.

### Defining User Tracking Points

Sterling Gentran:Viewpoint Tracking Management provides a mechanism to display pertinent data from User Applications on an Item Process Detail screen. There are 3 "process status" fields and 3 "user fields" that can be displayed. Field labels for this data, when it is displayed, can also be created. In addition, you can pass messages, from your application to Sterling Gentran:Viewpoint, which can be displayed on an Item Message List screen.

Four User Tracking Points have been provided for the tutorial, corresponding to the 4 applications you want to include in Tracking Management:

<b>@COMMIB</b>	Sample Inbound Communications Application
<b>@COMMOB</b>	Sample Outbound Communications Application
<b>@INVSYSYSTEM</b>	Sample Inbound Invoice Application
<b>@POSYSTEM</b>	Sample Outbound Purchase Order Application

The *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 4, "User Exits and APIs," explains the process of calling the Sterling Gentran:Viewpoint Gateways to pass application information to Sterling Gentran:Viewpoint. In addition, User

## Tracking Management Tutorial Setup

---

Tracking Points must be set up online, and be enabled in order for the application data to be passed.

The following steps will show you how to review the Sample Outbound Purchase Order Application Tracking Point @POSYSTEM, predefined for the Sterling Gentran:Viewpoint Tracking Management system.

1. Sign on to the Sterling Gentran online system.
2. Select Sterling Gentran:Viewpoint from the Sterling Gentran Main Menu.

The Sterling Gentran:Viewpoint Main Menu is displayed.

```
EDIM600 9.0_____ VIEWPOINT MAIN MENU 06/01/2011

Select one of the following.

— 1. System Options
    2. Extended System Management
    3. Exception Management
    4. Exception Inquiry
    5. Tracking Management
    99. Log Display

F1=Help F3=Exit F15=Logoff
```

3. From the Sterling Gentran:Viewpoint Main Menu select the Extended System Management option.



The User Tracking Point for the Sample Outbound Purchase Order System, is displayed.

```

EDIM611 9.2.7_____ USER TRACKING POINT DEFINITION 06/01/2011
Type Action, press Enter.
  _ 1=Add 2=Update 4=Delete

System . . . . . @POSYSTEM_
Process . . . . . VPOBAPPL
Description . . . . . SAMPLE_OUTBOUND_PURCHASE_ORDER_APPLICATION___
Item Type . . . . . U:ORDER_____ (F4=Prompt)
Status . . . . . E (E=Enabled, D=Disabled)

Process Status Names                                User Field Names
Status 1 Name   U:PGM._STATUS_                        Field 1 Name   U:ORDER_DATE_
Status 2 Name   U:ORDER_STATUS_                      Field 2 Name   U:SHIP_DATE_
Status 3 Name   U:ORDER_QTY._____                  Field 3 Name   U:BUYER_PHONE_

F1=Help  F3=Exit  F4=Prompt  F12=Cancel
  
```

Some information from the user application, that have significant meaning, would be passed to Tracking Management by calling the Sterling Gentran:Viewpoint Gateway. For more detailed information, refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 4, “User Exits and APIs”.

The following process status and user field labels are defined on this screen. When a query is made on the tracking data in Sterling Gentran:Viewpoint, these labels will appear on the Item Process Detail screen next to the data passed from the user application.

The status of the application program after it ran	U:PGM. STATUS
The status of the completed order	U:ORDER STATUS
The order quantity, exceeded or not	U:ORDER QTY.
The date of the order	U:ORDER DATE
The expected ship date of the order	U:SHIP DATE
The buyer's phone number	U:BUYER PHONE

Review the three other User Tracking Points that have been set up for the Tracking Management System. These tracking points are all active, and correspond to the tutorial jobs and test data provided with the Sterling Gentran:Viewpoint system.

For detailed information on defining a User Tracking Point Definition, refer to "EDIM611 - User Tracking Point Definition Screen" in Chapter 5, "Screen Descriptions".

6. Press **F3=Exit** to return to the Extended System Management Menu.
7. Press **F3=Exit** again to return to the Sterling Gentran:Viewpoint Main Menu.

## Tracking Management Tutorial Processing

### Tutorial Batch Processing

The steps provided here will generate tracking information for the items contained in the tutorial data. You will then be able to use the Sterling Gentran:Viewpoint Query Request capabilities for reviewing and responding to the tracking information.

In normal system operation, the processing performed by these steps would be an integrated part of your every day processing. For complete details about integrating Sterling Gentran:Viewpoint into your system operations, refer to Chapter 2, "Implementation Process".

1. **For users without the Sterling Connect system**, configure and submit JCL in member TMTUTOUT in GENTRAN.V6X6.VPT.JCL. This runs the outbound processes in Sterling Gentran using the tutorial data.

**Note:** If you are processing in Partner Relationship mode, you need to comment out the SYS095 DD statements for the Partner Cross Reference file and uncomment the EDIPREL DD statements for the Partner Relationship file.

Also, you need to modify the second parameter record in SYS001 for EBDI042 to assign "YOUR COMPANY" as the Default User ID starting in position 40.

**For users with Sterling Connect**, configure and submit JCL in member TMTUTOPL in GENTRAN.V6X6.VPT.JCL. This runs the outbound processes in Sterling Gentran and the Sterling Connect Offline Utilities using the tutorial data.

**Note:** If you are processing in Partner Relationship mode, you need to comment out the SYS095 DD statements for the Partner Cross Reference file and uncomment the EDIPREL DD statements for the Partner Relationship file.

Also, you need to modify the second parameter record in SYS001 for EBDI042 to assign "YOUR COMPANY" as the Default User ID starting in position 40.

2. **For users without the Sterling Connect system**, configure and submit JCL in member TMTUTIN in GENTRAN.V6X6.VPT.JCL. This runs the inbound processes in Sterling Gentran using the tutorial data.

**Note:** If you are processing in Partner Relationship mode, you need to comment out the SYS095 DD statements for the Partner Cross Reference file and uncomment the EDIPREL DD statements for the Partner Relationship file.



**For users with Sterling Connect**, configure and submit JCL in member TMTUTIPL in GENTRAN.V6X6.VPT.JCL. This runs the inbound processes in Sterling Gentran using the tutorial data and the Sterling Connect Offline Utilities.

**Note:** If you are processing in Partner Relationship mode, you need to comment out the SYS095 DD statements for the Partner Cross Reference file and uncomment the EDIPREL DD statements for the Partner Relationship file

**Note:** In order to run the TMTUTIPL job, ensure that the Sterling Gentran:Viewpoint tutorial data has been added successfully to the Sterling Connect Data Queues using the LOADVPPL JCL member. If the data is not available, JCL member LOADVPPL should be submitted for processing prior to running TMTUTIPL.

3. After these jobs finish, data from Sterling Gentran and optionally Sterling Connect will now reside in the Sterling Gentran:Viewpoint Staging Area.
4. From CICS, **if the Sterling Gentran:Viewpoint scanner has not already been started**, enter the task code **EDIV** to start the Sterling Gentran:Viewpoint scanner. This task will trigger Sterling Gentran:Viewpoint's post processor to move the data from the Sterling Gentran:Viewpoint Staging area to the Sterling Gentran:Viewpoint Repository and Master Index files.

**Note:** The response "Viewpoint Scanner Started" is displayed by **EDIV**. To verify the Sterling Gentran:Viewpoint scanner start up, select Log Display from the Sterling Gentran:Viewpoint Main Menu.

**Note:** If you are using system image, replace EDI with your system image characters.

You may now continue with the Tracking Management Tutorial at Query Requests.

### Tracking Query Requests

The system has been set up and now you are ready for ongoing/daily tasks. Query Request provides you with an idea of the direct benefits provided by Sterling Gentran:Viewpoint Tracking Management.

This tutorial example will illustrate the use of Tracking Management in the context of supporting your customer, VENDOR-1, as outlined in "Step 1 - Determining Tracking Management Business Requirements" earlier in this chapter. The following tasks are performed:

- Using Saved Query Requests
- Ad Hoc and Extended Query Requests
- Reviewing Exceptions from Tracking Management

## Using Saved Query Requests

Processes included in the Extended EDI System can be queried in Tracking Management. Decisions need to be made as to the Item Type you want to inquire on, and the selection criteria to use to query the items to be selected. Sterling Gentran:Viewpoint Tracking Management provides basic queries and extended search capabilities. Queries can be saved or created on an ad-hoc basis.

In order to perform a Query, an Item Type must be selected. Depending on the Item Type selected, the number of processes displayed for status history (or, the "tracking path") will vary. The Item Type determines the processes in the tracking path for the item that can be viewed for status history. The lower the level of item type you select, the more complete a tracking path will be displayed.

Level of item type refers to how close the item is, in form, to the actual end user application data. For example:

Documents and transactions correspond on a one to one basis, so they are item types at the same level. Many transactions are a part of a functional group, so they are item types at different levels. History information will be available for item types at the same level, or higher, for a given query request.

Using the sample environment, Item Types are listed below from lowest level to highest.

<b>Process</b>	<b>Item Type</b>	<b>Level</b>
User Inbound Application	U:INVOICE	1
Inbound Mapper	Document	1
Inbound Editor - Transaction	Transaction	1
Inbound Editor - Group	Functional Group	2
Inbound Editor - Interchange	Interchange	3
Connect Offline Utility Extract	Batch	4
User Inbound Communications	U:COMM BATCH	4
User Outbound Application	U:ORDER	1
Outbound Mapper	Document	1
Outbound Editor - Transaction	Transaction	1
Outbound Editor - Group	Functional Group	2
Outbound Editor - Interchange	Interchange	3
Connect Offline Utility Add	Batch	4
User Outbound Communications	U:COMM BATCH	4



- Type **5** in the Action Field, next to **@ORDERQY**, and press **Enter**.  
The Query Request screen is displayed with the **@ORDERQY** query.

```

EDIM702 9.5.2_____ QUERY REQUEST 06/01/2011
Type Action, press Enter
_ 1=Add 2=Update 4=Delete 6=Search 7=ExtCond 8=ItemHist 9=ItemDt1
 13=ItemRefs

Query ID @ORDERQY__ (F4=Prompt) Extended Condition used: NO
Description SAMPLE_OUTBOUND_PURCHASE_ORDER_HISTORY_QUERY_

Search Fields Search limit 010000 Find limit 000100
Item Type U:ORDER_____ (F4=Prompt)
Reference _____
Partner _____
Date From 12/01/2011 To 12/31/2011

A Item Type Reference Process
___
___
___
___
___

F1=Help F3=Exit F4=Prompt F7=Bkwd F8=Fwd F12=Cancel
    
```

- Type **6** in the Action Field, and press **Enter** to initiate the search.

```

EDIM702 9.5.2_____ QUERY REQUEST 06/01/2011
Type Action, press Enter
_ 1=Add 2=Update 4=Delete 6=Search 7=ExtCond 8=ItemHist 9=ItemDt1
 13=ItemRefs

Query ID @ORDERQY__ (F4=Prompt) Extended Condition used: NO
Description SAMPLE_OUTBOUND_PURCHASE_ORDER_HISTORY_QUERY_

Search Fields Search limit 010000 Find limit 000100
Item Type U:ORDER_____ (F4=Prompt)
Reference _____
Partner _____
Date From 12/01/2011 To 12/31/2011

A Item Type Reference Process
___ U:ORDER PONUMBER-055 VPOBAPPL
___ U:ORDER PONUMBER-056 VPOBAPPL
___ U:ORDER PONUMBER-057 VPOBAPPL
___ U:ORDER PONUMBER-058 VPOBAPPL
___ U:ORDER PONUMBER-059 VPOBAPPL
___ U:ORDER PONUMBER-060 VPOBAPPL

F1=Help F3=Exit F4=Prompt F7=Bkwd F8=Fwd F12=Cancel
    
```

The search result shows all of the purchase orders that have been processed by the VPOBAPPL application process between December 1, 2011 and December 31, 2011. The purchase order numbers, passed from the application, are also displayed.

5. You can refine this Query to show only the purchase orders sent to **VENDOR-1**. Enter **VENDOR-1** in the Partner Field, again type **6** in the Action Field and press **Enter**.

```

EDIM702 9.5.2 _____ QUERY REQUEST 06/01/2011
Type Action, press Enter
  _ 1=Add 2=Update 4=Delete 6=Search 7=ExtCond 8=ItemHist 9=ItemDtl
    13=ItemRefs

Query ID      @ORDERQY__ (F4=Prompt)      Extended Condition used: NO
Description   SAMPLE_OUTBOUND_PURCHASE_ORDER_HISTORY_QUERY_

Search Fields                               Search limit 010000 Find limit 000100
Item Type    U:ORDER_____ (F4=Prompt)
Reference
Partner      VENDOR-1_____
Date From    12/01/2011 To 12/31/2011

A Item Type      Reference                               Process
  U:ORDER        PONUMBER-055                          VPOBAPPL
  U:ORDER        PONUMBER-056                          VPOBAPPL
  _____
  _____
  _____
  _____

LAST ENTRY DISPLAYED
F1=Help F3=Exit F4=Prompt F7=Bkwd F8=Fwd F12=Cancel
    
```

Only the purchase orders destined for **VENDOR-1** are displayed.

6. Type **13** in the Action column, next to **PONUMBER-055**, and press **Enter**.  
 For users who have submitted the JCL in member **TMTUTOPL**, the Item Reference History screen in the figure below displays reference numbers associated with the item for each process along the tracking path.

```

EDIM711 _____ ITEM REFERENCE HISTORY 06/01/2011
Type Action, press Enter
  8=ItemHist 9=ItemDtl 10=MsgList 11=DataDisp 15=Excps

Reference: PONUMBER-055
Process    VPOBAPPL

A Item Process Description Reference
  U VPOBAPPL SAMPLE OUTBOUND PURC PONUMBER-055
  D EBDI042 OUTBOUND MAPPER PONUMBER-055
  T EBDI002 OUTBOUND EDITOR 000000030 /000000006 /000000011
  F EBDI002 OUTBOUND EDITOR 000000030 /000000006
  I EBDI002 OUTBOUND EDITOR 000000030
  B STOUTL OFFLINE UTILITIES 00000000000030
  _____
  _____
  _____
  _____
  _____
  _____

F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel
    
```





## Ad Hoc and Extended Query Requests

VENDOR-1 calls you with some distressing news. A payment for one of their invoices has not been received. They had received a call from your Accounts Payable department indicating that the invoice had been rejected in the translation system. In fact, Exception Management Profile & TEDIREJ had notified Accounts Payable of the rejected invoice and prompted them to call VENDOR-1. VENDOR-1 would like you to take a look at the problem and provide some more information, as they wish to send a new invoice. Tracking Management can be used to research the rejected invoice while you remain on the phone with VENDOR-1.

The following steps will show you how to resolve the problem with VENDOR-1:

1. Copy down the following information which VENDOR-1 provides:
 

Invoice Number:	<b>INV56</b>
Group Control Number of invoice they sent - on AK1:	<b>00000091</b>
Transaction Control Number from Invoice Rejected - on AK2:	<b>00025056</b>
The date the invoice was sent (today's date):	<b>mm/dd/yyyy</b>
2. Verify that a Functional Acknowledgement with the reject status was sent to VENDOR-1. You will use an ad hoc query for this task.

- a. From the Tracking Management Menu, select the Query Request option and press Enter.

To enter into ad-hoc query mode, space out the Query ID field and press **Enter** to display a blank Query Request screen.

- b. On the Query Request screen, type the following information:

Item Type:     **TRANSACTION**  
 Partner:       **VENDOR-1**

```

EDIM702 9.5.2_____          QUERY REQUEST          06/01/2011
Type Action, press Enter
_ 1=Add 2=Update 4=Delete 6=Search 7=ExtCond 8=ItemHist 9=ItemDtl
 13=ItemRefs

Query ID      _____ (F4=Prompt)          Extended Condition used: NO
Description   _____

Search Fields          Search limit 010000  Find limit 000100
Item Type  TRANSACTION_____ (F4=Prompt)
Reference  _____
Partner    VENDOR-1_____
Date From  _____ To _____

A Item Type          Reference          Process
—
—
—
—
—

F1=Help  F3=Exit  F4=Prompt  F7=Bkwd  F8=Fwd  F12=Cancel
    
```



- c. You will need to refine the search further, to specify that only Outbound 997s are to be included in the search.

On the Query Request screen, type **7** in the Action field and press **Enter**. This will display the Extended Search Condition screen.

Enter the following information:

Field	Op	Value	Connector
SET	EQ	997	AND
DIRECTION	EQ	O	

**Note:** The value of **O** indicates outbound.

```

EDIM703 _____ EXTENDED SEARCH CONDITION 06/01/2011
Type Action, press Enter
__ 6=Search 14=Query

Query ID :

Query Request Search Fields
Item Type: TRANSACTION
Reference:
Partner : VENDOR-1
Date From: _____ To

Extended Condition (F4=Prompt)
Field Op Value Connector
SET _____ EQ 997 _____ AND
DIRECTION _____ EQ O _____
_____
_____
_____
_____

F1=Help F3=Exit F4=Prompt F12=Cancel
    
```

- d. Type **6** in the Action field and press **Enter**. A confirmation message will be displayed. Press **Enter** again to run the query.

```

EDIM702 9.5.2_____ QUERY REQUEST 06/01/2011
Type Action, press Enter
  _ 1=Add 2=Update 4=Delete 6=Search 7=ExtCond 8=ItemHist 9=ItemDtl
    13=ItemRefs

Query ID _____ (F4=Prompt) Extended Condition used: YES
Description _____

Search Fields Search limit 010000 Find limit 000100
Item Type TRANSACTION_____ (F4=Prompt)
Reference _____
Partner VENDOR-1_____
Date From _____ To _____

A Item Type Reference Process
_ TRANSACTION 000000031 /000000025 /000000025 EBDI002
_
_
_
_
_

LAST ENTRY DISPLAYED
F1=Help F3=Exit F4=Prompt F7=Bkwd F8=Fwd F12=Cancel
    
```

The 997 sent to VENDOR-1 is now displayed.

- e. To review the detail of this Item, type **9** in the Action column next to the transaction, and press **Enter**.

```

EDIM712 _____ ITEM PROCESS DETAIL 06/01/2011
Type Action, press Enter.
  _ 8=ItemHist 10=MsgList 11=DataDisp 13=ItemRefs 14=Query 15=Excps

Item Identification
Item Type . . . : TRANSACTION
Reference . . . : 000000031 /000000025 /000000025
Trace ID . . . : OE00000029 To/From: OE00000030
User Reference:

System/Process: GENTRAN /EBDI002 Recip/Action:
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Direction/Set : OUTBOUND/997 Excp. Status:
Application . . :
Network . . . . :
Partner . . . . : VENDOR-1
Qual . . . . . :
Databank . . . : GENTRAN
Process Statuses
Ack Status . . . : Mapping Status :
Comp Status . . . : Network Status :
Env Status . . . : Seq Status . . . :

F1=Help F3=Exit F12=Cancel
    
```

The Item Process Detail screen provides more information about the 997 document.

- f. To view the actual data in the Databank, type **11** in the Action field and press **Enter**.

The entire functional acknowledgement is displayed.

- g. Press **F8=Fwd** to view the rest of the acknowledgement. Notice the "E" in the AK5 segment. This tells your trading partner that this particular invoice contained an error.

```
EDIM716 _____ ITEM DATA DISPLAY 06/01/2011
Type Action, press Enter.
__ 8=ItemHist 9=ItemDtl 10=MsgList 13=ItemRefs 15=Excps

System : GENTRAN
Process : EBDI002
Desc. : OUTBOUND EDITOR
Item Type: TRANSACTION
Reference: 000000031 /000000025 /000000025

Item Data
AK4*3*355*7*QQ?
AK3*CTT*34?
AK4*1*354*1* ?
AK5*E*4*5?
AK9*E*2*2*2?
SE*16*000000025?

END OF RECORDS FOR DOCUMENT
F1=Help F3=Exit F6=Next F7=Bkwd F8=Fwd F12=Cancel
```

- h. Press **F3=Exit** to return to the Tracking Management Menu.
3. Determine what happened to the invoice and why it was rejected. You will use the Query Request and save the Query ID.
- a. From the Tracking Management Menu, select the Query Request option and press **Enter**.

First verify that the invoice (INV56) never made it to the Inbound Invoice Application or the Inbound Mapper. This will determine that the invoice was rejected in the Inbound Editor.

- b. Enter a new Query ID. On the Query Request screen, type **1** to add a Query, then type the following information:

```
Query ID:    INVOICE1
Description: Search for Rejected Invoice
Item Type:   U:INVOICE
Reference:   INV56
Partner:    VENDOR-1
```

**Note:** U:INVOICE are items from the Inbound Invoice Application.

Press **Enter** to add the Query **INVOICE1**.

```

EDIM702 9.5.2_____ QUERY REQUEST 06/01/2011
Type Action, press Enter
_ 1=Add 2=Update 4=Delete 6=Search 7=ExtCond 8=ItemHist 9=ItemDtl
13=ItemRefs

Query ID INVOICE1__ (F4=Prompt) Extended Condition used: YES
Description SEARCH_FOR_REJECTED_INVOICE_____

Search Fields Search limit 010000 Find limit 000100
Item Type U:INVOICE_____ (F4=Prompt)
Reference INV56_____
Partner VENDOR-1_____
Date From _____ To _____

A Item Type Reference Process
--
--
--
--
--
--

ADD COMPLETE
F1=Help F3=Exit F4=Prompt F7=Bkwd F8=Fwd F12=Cancel
    
```

- c. Type **6** in the Action field and press **Enter** to run the Query.

There is no information -- the invoice never made it to the Inbound Invoice Application.

- d. Modify the Query by changing the Item Type to DOCUMENT (referring to the Inbound Mapper):

Item Type: **DOCUMENT**

Type **6** in the Action field and press **Enter** to run the Query.

Again, there is no information -- the invoice never made it to the Inbound Mapper.

- e. Modify the Query again, this time with the following information:

Item Type: **TRANSACTION**

Reference:

Date From: **mm/dd/yyyy**

**Note:** TRANSACTION refers to the Inbound Editor; we are deleting the reference as it would be a control number for the transaction; mm/dd/yyyy refers to today's date.

Type **2** in the Action field and press **Enter** to update and save the Query.

- f. Type **7** in the Action field and press **Enter** to get to the Extended Search Condition screen. We will refine the Query to find the invoice in question.

On the Extended Search Condition screen type the following:

Field	Op	Value	Connector
SET	EQ	810	AND
DIRECTION	EQ	I	AND
ACKNOWLEDGEMENT STATUS	EQ	E	

```

EDIM703 _____ EXTENDED SEARCH CONDITION 06/01/2011
Type Action, press Enter
  __ 6=Search 14=Query

Query ID   : INVOICE1   SEARCH FOR REJECTED INVOICE

Query Request Search Fields
Item Type: TRANSACTION
Reference:
Partner   : VENDOR-1
Date From: 06/01/2011 To

Extended Condition (F4=Prompt)
Field      Op  Value      Connector
SET        EQ  810        AND
DIRECTION EQ  I          AND
ACKNOWLEDGEMENT_STATUS EQ E
_____  --  _____  --
_____  --  _____  --
_____  --  _____  --
_____  --  _____  --

F1=Help  F3=Exit  F4=Prompt  F12=Cancel
    
```

- g. Type **14** in the Action field and press **Enter**. This will allow you to return to the Query Request screen. Type **2** in the Action field and press **Enter** to update and save the query.

- h. Type **6** in the Action field and press **Enter** to run the Query.

```

EDIM702 9.5.2_____ QUERY REQUEST 06/01/2011
Type Action, press Enter
_ 1=Add 2=Update 4=Delete 6=Search 7=ExtCond 8=ItemHist 9=ItemDtl
 13=ItemRefs

Query ID INVOICE1__ (F4=Prompt) Extended Condition used: YES
Description SEARCH_FOR_REJECTED_INVOICE_____

Search Fields Search limit 010000 Find limit 000100
Item Type TRANSACTION_____ (F4=Prompt)
Reference _____
Partner VENDOR-1_____
Date From 06/01/2011 To _____

A Item Type Reference Process
__ TRANSACTION 000000237 /000000091 /000025056 EBDI001
__
__
__
__
__

LAST ENTRY DISPLAYED
F1=Help F3=Exit F4=Prompt F7=Bkwd F8=Fwd F12=Cancel
    
```

You can find Functional Group Control Number "91" and Transaction Control Number "25056". This is the rejected invoice.

- i. Review the history of the invoice to verify where the problem occurred.

Type **8** in the Action column, next to the invoice with Transaction Control Number "25056," and press **Enter** to view the Item Status History.

For users who have submitted the JCL in member TMTUTIPL for processing, the Item Status History screen in the figure below shows you that the invoice transaction had a status of "04" in the Inbound Editor. The next task illustrates how the actual exception can be verified and explained to the customer.



## Reviewing Exceptions from Tracking Management

On the Item Status History screen, an exception count for the item for each process is given. You can "jump" to Exception Management to view details of the exceptions.

The following steps will explain how to review exceptions from Tracking Management:

1. With the example rejected invoice, there are Exceptions tied to the item.  
Type **15** next to the **T** (Transaction) item with a status of **04** and press **Enter** to view the Item Exception Status screen.

```

EDIM718 _____ ITEM EXCEPTION STATUS 06/01/2011
Type Action, press Enter.
  __ 8=ItemHist  9=ItemDtl 10=MsgList 11=DataDisp 13=ItemRefs 16=ExcpDtl

System   : GENTRAN
Process  : EBDI001
Desc.    : INBOUND EDITOR
Item Type: TRANSACTION
Reference: 000000237 /000000091 /000025056

A  Recipient  Action      Status   Date       Time       Capture Id
__  &TAPDEPT  &TBTCHFAX  OPEN    06/01/2011 12:00    &TEDIREJ
__  @EDITORS           OPEN    06/01/2011 12:00    @MODEL-IE
__
__
__
__
__
__
__
__
__
__

F1=Help  F3=Exit  F7=Bkwd  F8=Fwd   F12=Cancel
    
```

This screen shows the open exceptions; the one we care about is the one that the A/P department has not closed.



2. Type **16** in the Action column next to the first open Exception (Recipient **&TAPDEPT**), and press **Enter**. This action will cause a "jump" from Tracking Management to Exception Management and display the Exception Detail screen.

```
EDIM649 _____ EXCEPTION DETAIL 06/01/2011
Type Action, press Enter.
  __ 4=Delete 6=MsgList 7=Data 8=UserMsg 9=UserProc 10=ExcpHist 11=Recip.
     12=ItemExcp

Recipient . . . : &TAPDEPT  ACCOUNTS PAYABLE DEPARTMENT
Excp Status . . : OPEN 06/01/2011 12:00
Excp Tag . . . : 0000000056
User Reference: 000000237 /000000091 /000025056

System/Process: GENTRAN /EBDI001 Excp. Action: &TBTCHFAX
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm: 06/01/2011-12:00
Capture ID. . . : &TEDIREJ Databank: GENTRAN
Description . . : CAPTURE REJECTED INVOICES

Application : Interchange: 000000237
Network . . . : Group: 000000091
Direction/Set : INBOUND /810 Trans: 000025056
Partner . . . : VENDOR-1
Qual . . . . :

F1=Help F3=Exit F6=Next F12=Cancel
```

3. Type **8** in the Action field and press **Enter**. This will provide the User Message Display. This message was created in Exception Management to describe, in your terms, what caused the Exception.

```
EDIM662 _____ USER MESSAGE DISPLAY 06/01/2011
Type Action, Press Enter.
  __ 6=Excp 7=MsgList 8=Data 9=UserProc 10=ExcpHist

Reference : 000000237 /000000091 /000025056
Excp Tag : 0000000056
Description: CAPTURE REJECTED INVOICES

Message
  U-003001 CRITICAL ERROR -- REJECTED

Explanation
  AN INBOUND INVOICE WAS REJECTED BY THE EDI EDITOR FOR FAILURE TO PASS
  COMPLIANCE CHECKING.

F1=Help F3=Exit F12=Cancel
```

4. Type **7** in the Action field and press **Enter**. This will display the Exception Message List screen.

```

EDIM650 _____ EXCEPTION MESSAGE LIST 06/01/2011
Type Action, press Enter.
  6=Excp  7=Data  8=UserMsg  9=UserProc 10=ExcpHist

System   : GENTRAN
Process  : EBDI001
Desc.    : CAPTURE REJECTED INVOICES
Reference: 000000237 /000000091 /000025056

A Message
___ U-003001 CRITICAL ERROR -- REJECTED
___ 62 17 BIG 1 MISSING INDICATED MANDATORY ELE
   MENT.
___ 63 20 REF 1 IN THE IDENTIFIED ELEMENT, AN I
   NVALID CODE WAS FOUND.
___ 62 22 N1 1 MISSING INDICATED MANDATORY ELE
   MENT.
___ 63 26 IT1 3 QQ IN THE IDENTIFIED ELEMENT, AN I
   NVALID CODE WAS FOUND.
___ 62 29 CTT 1 MISSING INDICATED MANDATORY ELE
   MENT.

F1=Help F3=Exit F6=Next F7=Bkwd F8=Fwd F12=Cancel

```

These are messages passed by Sterling Gentran. The same messages could have been viewed while remaining in Tracking Management (for example, from Item Status History). In addition, User Applications can pass messages through to Sterling Gentran:Viewpoint. Messages for User Applications can only be viewed in Tracking Management.

The Exception Message List screen tells us that rejection took place as a result of a missing mandatory element.

5. Type **9** in the first Action column and press **Enter**. This action displays the User Procedure Display screen.

The screen below is the User Procedure created for handling rejected invoices.

```
EDIM663 _____ USER PROCEDURE DISPLAY 06/01/2011
Type Action, Press Enter.
  _ 6=Excp 7=MsgList 8=Data 9=UserMsg 10=ExcpHist

Procedure : UP3001
Description: HANDLE REJECTED INVOICES

Procedure
  1. IDENTIFY PARTNER
  2. GET ENVELOPE CONTROL NUMBERS
  3. NOTIFY PARTNER TO HAVE INVOICE SENT AGAIN
  4. TRANSFER THIS EXCEPTION TO THE RECIPIENT &TEDIGRP (EDI GROUP) WHO WILL
     CLOSE THIS EXCEPTION OUT

F1=Help F3=Exit F12=Cancel
```

6. Type **10** in the Action field and press **Enter**. This will take you to the Exception History screen where you can view the history of the Exception.

```
EDIM652 _____ EXCEPTION HISTORY 06/01/2011
Type Action, Press Enter.
  _ 6=Excp 7=Data 8=MsgList 9=HistUpdt

Reference . . : 000000237 /000000091 /000025056
Current Status : OPEN
Date-Time . . : 06/01/2011 - 12:00

Status . . . . :
Update Initials:
Date-Time . . : -
Recipient . . :

Note . . . . . :

LAST ENTRY DISPLAYED
F1=Help F3=Exit F6=Next F8=Fwd F12=Cancel
```

7. To close the Exception out, type **9** in the Action field and press **Enter** to display the Exception History Update screen.

Close the Exception by typing **C** in the Status field and typing a note at the bottom:

**THIS ITEM HAS BEEN CLOSED BY THE EDI COORDINATOR. IT SHOULD HAVE BEEN TRANSFERRED TO THE EDI GROUP. I WILL NOTIFY THEM. VENDOR-1 HAS BEEN NOTIFIED AND A NEW INVOICE WILL BE SENT.**

8. Type **2** in the Action field and press **Enter**. The system will display a confirmation message. Press **Enter** again to close the Exception.

```

EDIM654 _____ EXCEPTION HISTORY UPDATE 06/01/2011
Type Action, Press Enter.
  _ 2=Update

Reference . . . : 000000237 /000000091 /000025056
Current Status : OPEN
Date-Time . . . : 06/01/2011 - 12:00

Status . . . . . C (C=Close, R=Review, T=Transfer)
Update Initials: VPT TUTORIAL
Date-Time . . . : 06/01/2011 - 12:00
Recipient . . . _____ (F4=Prompt)
Description . .

Note . . . . . THIS_ITEM_HAS_BEEN_CLOSED_BY_THE_EDI_COORDINATOR.IT_____
SHOULD_HAVE_BEEN_TRANSFERRED_TO_THE_EDI_GROUP.I_WILL_NOTIFY_THEM._____
VENDOR-1_HAS_BEEN_NOTIFIED_AND_A_NEW_INVOICE_WILL_BE_SENT._____

UPDATE COMPLETE
F1=Help F3=Exit F4=Prompt F12=Cancel
    
```

9. Press **F12=Cancel** to return to the Exception History screen.
10. Type **6** in the Action field and press **Enter** to return to the Exception Detail screen.
11. Type **12** in the Action field and press **Enter** to make the "jump" back to Tracking Management and the Item Exception Status screen. The Exception will now show a status of **Closed**.
12. Press **F3=Exit** to return to the Tracking Management Menu.

While VENDOR-1 is still on the phone, you have been able to relay the information you queried, and the action you took. VENDOR-1 now knows what to do to correct the invoice and resend it.

This completes the Query Request tasks for the sample business situation. You may use these steps to perform additional queries against the tutorial data.

Once you have finished using the tracking information created with the tutorial (and exceptions), you should follow the **Tutorial Reset Instructions** in "Tracking Management Tutorial Reset" at the end of this chapter.

### Requesting Tracking Management Reports

Although Sterling Gentran:Viewpoint automates the tasks of monitoring your EDI processing, there may still be instances when reports will need to be generated. The Sterling Gentran:Viewpoint Maintenance/Inquiry feature allows you to specify the type of information you want reported.

For detailed information about the wide range of selection criteria available, refer to the "Selection Criteria Reference Chart" in Chapter 5, "Screen Descriptions".

In this example, the EDI manager wants to list and determine how many purchase orders were processed by the purchase order system during the current month (for example, December 2011).

#### Creating an Inquiry Definition

1. From the Sterling Gentran:Viewpoint Main Menu, select Extended System Management.
2. From the Extended System Management Menu, select Maintenance/Inquiry Options Definition. The Maintenance/Inquiry Options Definition screen will be displayed.
3. Enter the following information:

Identifier:	<b>&amp;TPOITEMS</b>
Description:	<b>PURCHASE ORDERS PROCESSED IN A MONTH</b>
Status:	<b>E</b>
File:	<b>REPOSITORY</b>
Mode:	<b>INQUIRY</b>
Class:	<b>TRACKING</b>
Report Level:	<b>STATUS</b>
Selection Criteria:	<b>ITEM TYPE EQ U:ORDER AND PROCESSED DATE GE 06/01/2011 (MM/DD/YYYY) * AND PROCESSED DATE LE 12/31/2011 (MM/DD/YYYY)*</b>

\*. substitute start/end dates of the current month

4. Type a **1** in the Action field and press **Enter**. The system will display a confirmation message. Press **Enter** again to confirm the ADD.

```

EDIM609 9.2.5_____ MAINTENANCE/INQUIRY OPTIONS DEFINITION 06/01/2011
Type Action, press Enter.
  _ 1=Add 2=Update 4=Delete

Identifier  &TPOITEMS_
Description PURCHASE_ORDERS_PROCESSED_IN_A_MONTH_____
Status . . . E (E=Enabled, D=Disabled)

Operation (F4=Prompt)
File . . . REPOSITORY          Class . . . TRACKING__
Mode . . . INQUIRY            Report Level STATUS

Selection Criteria (F4=Prompt)
Field      Op  Value
ITEM_TYPE  EQ  U:ORDER_____
PROCESSED_DATE  GE  06/01/2011_____
PROCESSED_DATE  LE  06/01/2011_____
_____
_____
_____
_____
_____

ADD COMPLETE
F1=Help  F3=Exit  F4=Prompt  F12=Cancel
    
```

5. Press **F3=Exit** twice to return to the Sterling Gentran:Viewpoint main menu.

## Generating Reports

The report is generated by running the batch procedure, Maintenance/Inquiry (EDIN140), and specifying the Inquiry Definition Identifier **&TPOITEMS** that was just created. This job may be included in your daily job stream.

For information about “EDIM609 - Maintenance/Inquiry Options Definition Screen,” refer to Chapter 5, “Screen Descriptions”. For detailed information about batch program “EDIN140 - Maintenance/Inquiry,” refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 1, “Batch Program Descriptions”.

Sterling Gentran:Viewpoint is delivered with several models for Maintenance/Inquiry. You may want to review these from the Maintenance/Inquiry Directory and build maintenance criteria and special reports for your specific needs.

For this example, the number of purchase orders can be found on the "Total Entries Selected" line in the Processing Summary Report. Each purchase order is also listed in the Status Report.

## Tracking Management Housekeeping

Periodic maintenance should be performed on your Sterling Gentran:Viewpoint system. For example, you may decide to delete tracking information that has been saved for longer than 31 days.

### Creating a Maintenance Definition

Follow these steps to create a definition that purges tracking information over 31 days old. When the scheduled processing of the JCL occurs, the purge will occur.

1. From the Sterling Gentran:Viewpoint Main Menu, select Extended System Management.
2. From the Extended System Management Menu, select Maintenance/Inquiry Options Definition. The Maintenance/Inquiry Options Definition screen will be displayed.
3. Enter the following information:

Identifier:	<b>&amp;TDELT31</b>
Description:	<b>DELETE TRACKING INFORMATION OVER 31 DAYS</b>
Status:	<b>E</b>
File:	<b>REPOSITORY</b>
Mode:	<b>PURGE</b>
Class:	<b>TRACKING</b>
Report Level:	<b>BOTH</b>
Selection Criteria:	<b>AGE TRACKING GT 031</b>

4. Enter a **1** in the Action field and press **Enter**. The system will display a confirmation message. Press **Enter** again to confirm the ADD.
5. Press **F3=Exit** twice to return to the Sterling Gentran:Viewpoint Main Menu.

### Performing File Maintenance

The items will be purged, and optionally archived, by running the batch procedure Maintenance/Inquiry (EDIN140) and specifying the Maintenance Definition Identifier **&TDELT31** that was just created. This job may be included in your daily job stream.

For detailed information about “EDIM609 - Maintenance/Inquiry Options Definition Screen,” refer to Chapter 5, “Screen Descriptions”. For detailed information about the batch program “EDIN140 - Maintenance/Inquiry,” refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 1, “Batch Program Descriptions”.

Sterling Gentran:Viewpoint is delivered with several models for Maintenance/Inquiry. You may want to review these from the Maintenance/Inquiry Directory and build maintenance criteria and special reports for your specific needs.

## Tracking Management Tutorial Reset

### Tutorial Reset Instructions

You may reset the tutorial by using the Sterling Gentran:Viewpoint Maintenance/Inquiry feature to purge the tutorial data from the repository. The following instructions pertain to the tracking information generated in the tutorial. Refer to "**Tutorial Reset Instructions**" in "Exception Management Tutorial Reset" to remove exception information.

```

EDIM609 9.2.5_____ MAINTENANCE/INQUIRY OPTIONS DEFINITION 06/01/2011
Type Action, press Enter.
  _ 1=Add 2=Update 4=Delete

Identifier ANYNAME____
Description PURGE_TUTORIAL_TRACKING_DATA_____
Status . . . E (E=Enabled, D=Disabled)

Operation (F4=Prompt)
  File . . . REPOSITORY          Class . . . TRACKING__
  Mode . . . PURGE__            Report Level BOTH__

Selection Criteria (F4=Prompt)
  Field           Op  Value                               Con.
  PARTNER_____ EQ  VENDOR-1_____ OR_
  PARTNER_____ EQ  VENDOR-2_____ OR_
  PARTNER_____ EQ  VENDOR-3_____ OR_
  PARTNER_____ EQ  VENDOR-4_____ OR_
  ITEM_TYPE_____ EQ  U:COMM_BATCH_____ OR_
  ITEM_TYPE_____ EQ  U:BATC_____

ENTRY NOT DEFINED
F1=Help F3=Exit F4=Prompt F12=Cancel

```

1. Create an Online Maintenance/Inquiry Options Definition with the following information:

File: **REPOSITORY**

Mode: **PURGE**

Class: **TRACKING**

Report Level: **BOTH**

Selection Criteria: **PARTNER EQ VENDOR-1 OR  
PARTNER EQ VENDOR-2 OR  
PARTNER EQ VENDOR-3 OR  
PARTNER EQ VENDOR-4 OR  
ITEM TYPE EQ U:COMM BATCH OR  
ITEM TYPE EQ U:BATC**



2. Run the batch job EDIN140, specifying the Maintenance definition identifier just created. This will delete the tutorial data from the Sterling Gentran:Viewpoint Repository.

**Note:** The definitions and profiles defined in the Exception Setup portion of the tutorial are still enabled for capturing exceptions. To remove these, you should mark them for deletion using the Exception Management Menu options.

**Caution to the EDI Coordinator:**

Use caution running any tutorial or practice data in a production environment. It is a good idea to use the tutorial naming convention (&T...) used in the tutorial to ensure that sample data will not interfere with live data.



# Using the Online Facility

This chapter provides general use information and a common reference for the Online Facility Function Keys and Actions.

Chapter Four is organized into six sections:

<b>Topic</b>	<b>Page</b>
Prerequisites .....	4-2
Sterling Gentran:Viewpoint Options .....	4-2
Sterling Gentran:Viewpoint Users .....	4-4
Function Keys .....	4-4
Actions .....	4-5
Jump Codes .....	4-8

## Prerequisites

It is recommended that users of the Online Facility should be familiar with Sterling Gentran:Viewpoint features, concepts, and terminology. For details regarding these topics, refer to Chapter 1, “Feature Summary” and “Concepts and Terminology”. For new users, Chapter 3, “Tutorial” provides basic instructions for managing exceptions and using Tracking Management.

## Sterling Gentran:Viewpoint Options

The Sterling Gentran:Viewpoint Main Menu provides you with direct access to the primary functions of the Sterling Gentran:Viewpoint product.

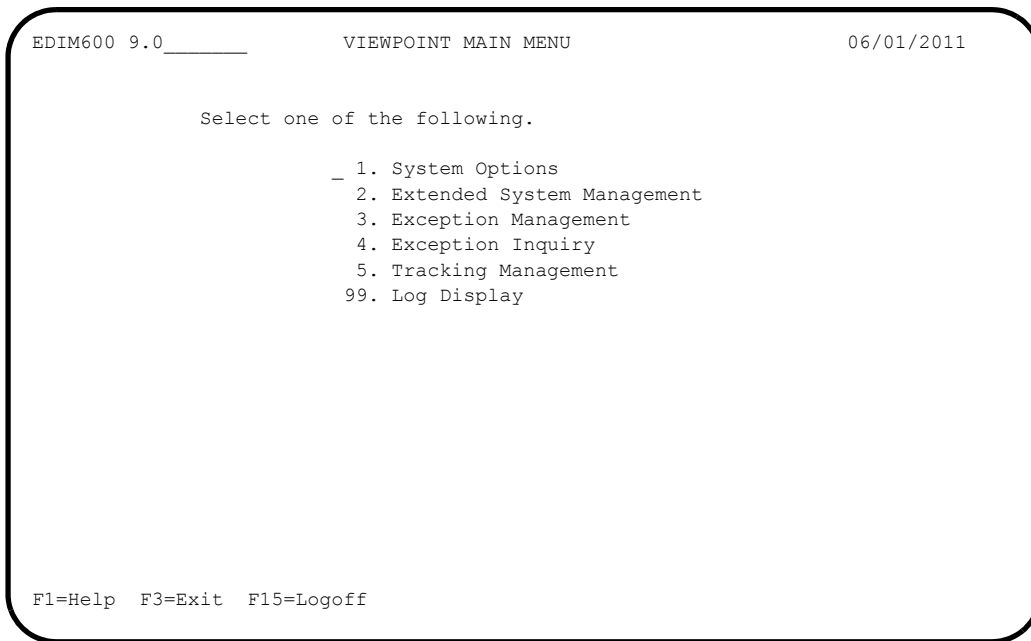
Refer to "Sterling Gentran:Viewpoint High-Level Navigation", for a high-level navigation flow of the options for Sterling Gentran:Viewpoint.

The options available from the Sterling Gentran:Viewpoint Main Menu are:

<b>System Options</b>	Provides global control for Sterling Gentran:Viewpoint processing.
<b>Extended System Management</b>	Provides administrative functions for defining and managing your Extended EDI System monitoring.
<b>Exception Management</b>	Provides set up and control for managing exceptions within your Extended EDI system.
<b>Exception Inquiry</b>	Provides end users with the tools needed to manage exceptions that have occurred in their EDI processing environment.
<b>Tracking Management (optional)</b>	Provides end users with query functions to search for an item travelling through the extended EDI environment.
<b>Log Display</b>	From the Log Display, you may view all system messages generated by the Sterling Gentran:Viewpoint background CICS functions.

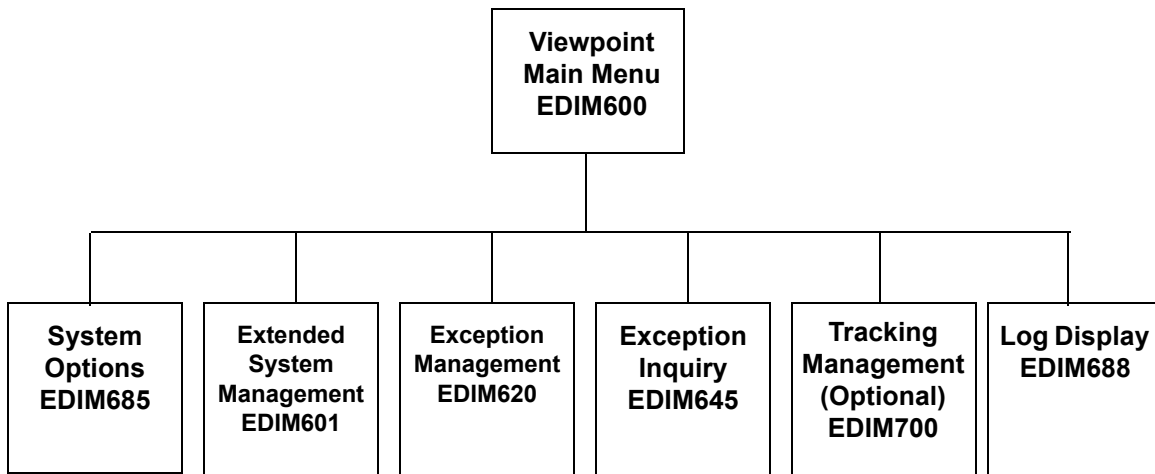
## Main Menu Options

The following diagram illustrates the Sterling Gentran:Viewpoint Main Menu.



## Sterling Gentran:Viewpoint High-Level Navigation

Figure 4.1 illustrates the high-level navigation path of the Sterling Gentran:Viewpoint screens.



**Figure 4.1 Sterling Gentran:Viewpoint High-Level Navigation**

## Sterling Gentran:Viewpoint Users

The typical users of Sterling Gentran:Viewpoint fall into two categories:

- Administrative Users (for example, System Administrator, EDI Coordinator)
- End-Users (for example, Customer Order Processing clerk)

Administrative Users access System Options, Extended System Management, and Exception Management to set up and control the Sterling Gentran:Viewpoint environment. The EDI Coordinator typically performs these functions.

End Users access Exception Inquiry, Tracking Management, and possibly, Exception Management to manage exceptions which occur against their business documents, and monitor their business data through their extended EDI systems on a day-to-day basis.

## Function Keys

Sterling Gentran:Viewpoint provides the following function keys in the Online Facility:

<b>F1=Help</b>	If the cursor is not positioned on a field, screen level Help information is displayed. If you position the cursor on a field, field level Help for that field is displayed.
<b>F3=Exit</b>	Returns to the previous menu.
<b>F4=Prompt</b>	Displays a selection list of values available for the field on which the cursor is currently located. The prompt function is only available on fields that are marked with <b>F4=Prompt</b> .
<b>F6=Next</b>	Displays the same entry or display screen for the next object from the current list screen. No update is performed for the current object.
<b>F7=Bkwd</b>	Scroll backward through the list on the current screen.
<b>F8=Fwd</b>	Scroll forward through the list on the current screen.
<b>F10=FldDtl</b>	Displays the detail screen for the field where the cursor is currently located. The field detail function is only available for fields that have "D" (Detail) as a valid value.
<b>F12=Cancel</b>	Back up in the dialog, one screen at a time. No update is performed on the current object.

## Actions

Sterling Gentran:Viewpoint provides actions to users of the Online Facility. Actions are presented in the form of an Action List at the top of each screen. To invoke an action, type the action code number of the action you wish to invoke, and press **Enter**.

The following actions are available in the Sterling Gentran:Viewpoint Online Facility.

<b>Add</b>	The Action code for <b>Add</b> is always <b>1</b> . Use the Add action to add new entries (for example, Sterling Gentran:Viewpoint Profile Definition) to the Sterling Gentran:Viewpoint system. If the object already exists, an error message is issued to which you must respond. In this situation, you must either use the Update action or change the object you are trying to add to an object that does not exist. A confirmation response is requested for the Add action. Respond to the confirmation by pressing <b>Enter</b> to complete the action. Respond to the confirmation by pressing <b>F12=Cancel</b> to cancel the action.
<b>Data</b>	Enter the Data action to display the data for the current exception. The Exception Data Display screen displays exception data processed by the Sterling Gentran translation system. <b>For Sterling Gentran:Plus users</b> , the Interchange Detail screen displays exception data processed by the Sterling Connect communications system.
<b>Delete</b>	The Action code for <b>Delete</b> is always <b>4</b> . Type <b>4</b> in the Action field to mark the entry for deletion. The next maintenance run will remove the entry and optionally archive it. To recover an entry that has been deleted, you must restore it from the archive file. An entry marked for deletion is displayed until maintenance removes it from Sterling Gentran:Viewpoint. An entry marked for deletion cannot be updated. A confirmation response is requested for the Delete action. Respond to the confirmation by pressing <b>Enter</b> to complete the action. Respond to the confirmation by pressing <b>F12=Cancel</b> to cancel the action.
<b>Disable</b>	Use <b>Disable</b> to disable the Sterling Gentran:Viewpoint system, functional areas, and profiles.
<b>Enable</b>	Use <b>Enable</b> to enable the Sterling Gentran:Viewpoint system, functional areas, and profiles.
<b>Excp</b>	The Exception Detail screen is displayed.
<b>ExcpHist</b>	The Exception History screen is displayed.
<b>ExcpList</b>	The Exception List screen is displayed.
<b>HistUpdt</b>	The History Update screen for the current exception is displayed.
<b>MsgList</b>	The Message List screen is displayed, listing all messages issued for the item by the process. For Sterling Gentran processes, all messages issued by the process are listed. <b>For Sterling Gentran:Plus users</b> , the explanatory text associated to a Sterling Connect failure code is

---

	displayed. For User processes, the only message(s) displayed are those passed to Sterling Gentran:Viewpoint for the item by the user application.
<b>Recip.</b>	The Recipient Detail screen is displayed.
<b>Select</b>	The Action code for <b>Select</b> is always <b>5</b> . The Detail screen for the selected entry is displayed.
<b>TSQDir</b>	The Staging Temporary Storage Queue Directory screen is displayed.
<b>Update</b>	The Action code for <b>Update</b> is always <b>2</b> . The entry is updated using the screens current values. If the entry does not exist, a message is issued which you must respond to. In this situation you must either use the Add action or change the object you are trying to update to be an object which does exist. A confirmation response is requested for the Update action. Respond to the confirmation by pressing <b>Enter</b> to complete the action. Respond to the confirmation by pressing <b>F12=Cancel</b> to cancel the action.
<b>Usage</b>	The Usage Cross Reference screen is displayed.
<b>UserMsg</b>	The User Message Display screen is displayed.
<b>UserProc</b>	The User Procedure Display screen is displayed.

### Tracking Management Only

<b>DataDisp</b>	For Sterling Gentran data items, the Item Data Display screen is displayed to show the data for the item. All messages for the item are inserted into the data in the appropriate places. This action is only valid for Sterling Gentran processes. To use this action, the Sterling Gentran Databank Message Store must be implemented.  <b>For Sterling Gentran:Plus users</b> , Sterling Connect data items are displayed by the Interchange Detail screen. To use this action, the data must be stored on the Sterling Connect Data Queues.
<b>Excps</b>	The Item Exception Status screen is displayed to show a list of recipients that captured the item.
<b>ExcpDtl</b>	The Exception Detail screen from the Exception Inquiry functional area is displayed. This screen will display the exception detail information for the item.
<b>ExtCond</b>	The Extended Search Condition screen is displayed. From this screen you may add to your search criteria specified on the Query Request screen. This screen should be used when the Query Request screens Search Fields are not sufficient for specifying your query condition.
<b>ItemDtl</b>	The Item Process Detail screen is displayed.
<b>ItemExcp</b>	The Item Exception status screen is displayed.



<b>ItemHist</b>	The Item Status History screen is displayed. Processes are listed in chronological order with a status indicator issued by each process.
<b>ItemRefs</b>	The Item Reference History screen is displayed. Processes are listed in chronological order with the reference assigned to the item by each process.
<b>Query</b>	Return to the Query Request screen. The search field, extended search condition, and the items that were found will be displayed.
<b>Search</b>	<p>The Action Code for Search is 6. When Search is requested, Sterling Gentran:Viewpoint searches for items that match the search fields that you have entered.</p> <p>There are two options set by the user on the Sterling Gentran:Viewpoint record in the Configuration file which are used to minimize the time Sterling Gentran:Viewpoint spends searching for items:</p> <ul style="list-style-type: none"><li>• One is the Search Limit, which is used to control the number of items Sterling Gentran:Viewpoint will check before ending the search.</li><li>• The other is the Find limit, which causes Sterling Gentran:Viewpoint to stop searching after it has found this number of items.</li></ul> <p>For more details about these configuration options, refer to “EDICFG - Configuration File” in the <i>IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide</i> “File Descriptions” chapter.</p> <p>The search function tries to find all items in your entire extended EDI environment that satisfy the search field values. If an extended search condition has been entered, the items must also match the extended condition. The search fields and Extended Condition can be changed to further reduce the current list by entering <b>6</b> in the Action field to perform the search again.</p>

## Jump Codes

A Jump Code is a 10-character alphanumeric field located at the upper left corner of each Sterling Gentran:Viewpoint screen. This field enables you to move, or “jump”, directly from one screen to another while bypassing menus. All screens accessible through a Sterling Gentran:Viewpoint menu have jump code values associated with them. Screens accessible only from detail screens do not have jump code values associated with them.

### How to Jump Between Screens

In the Sterling Gentran:Viewpoint system, you can jump between screens without having to navigate through the Sterling Gentran:Viewpoint menus. Use the following procedure to jump between screens:

1. Press **Home**.  
The cursor moves to the jump code field at the top of the screen to the right of the screen number.
2. Type the jump code and press **Enter**.  
For a complete list of Sterling Gentran:Viewpoint Jump Codes and their associated screens, refer to “Appendix A” of this guide.

### Types of Jump Codes

There are three types of jump codes:

- Numeric
- Alphabetic
- Special Character

These jump codes are described in detail below:

#### Numeric Jump Codes

Numeric Jump Codes consist of numbers separated by periods (.). The numbers in the jump code correspond to the numbers selected on menus, in the order in which they are selected.

For example:

To display the Sterling Tracking Point Definition screen, you could navigate using the Sterling Gentran menus by performing the following steps:

1. Type **9** on the Sterling Gentran Main Menu and press **Enter**.
2. Type **2** on the Sterling Gentran:Viewpoint Main Menu and press **Enter**.
3. Type **2** on the Extended System Management Menu and press **Enter**.

OR “jump” directly to the Sterling Tracking Point Definition screen by performing the following steps:

1. Press **Home**.
2. Type **9.2.2** in the jump code field of any screen, and press **Enter**.

For a complete list of Sterling Gentran:Viewpoint Jump Codes and their associated screens, refer to “Appendix A” of this guide.

### Alphabetic Jump Codes

Alphabetic Jump Codes consist of alphabetic characters separated by periods (.). The alphabetic code is an abbreviated reference to the screen name or function.

For example:

To display the Sterling Tracking Point Definition screen using the alphabetic jump code, type **VP.STPDEF** in the jump code field of any screen and press **Enter**.

For a complete list of Sterling Gentran:Viewpoint Jump Codes, and their associated screens, refer to “Appendix A” in this guide.

### Special Character Jump Codes

Special Character Jump Codes enable you to perform standard or generic functions with jump codes. The two special character jump codes are SWAP and EXIT.

- **SWAP** enables you to jump between Sterling Gentran online subsystems (for example, Partner, Databanking, Sterling Gentran:Viewpoint, etc.) not within subsystems. When you use jump code “SWAP”, you jump to the last screen you “jumped” from (but not navigated from), within another subsystem. When you jump from a different subsystem, you reset the SWAP positioning to the screen you are jumping from.

For example:

- You are currently on the Group Information screen in the Partner subsystem.
- You jump to the Sterling Tracking Point Definition screen in the Sterling Gentran:Viewpoint subsystem.
- After you have reviewed the information on the Sterling Tracking Point Definition screen, type **SWAP** in the jump code field.
- You will be returned to the Group Information screen in the Partner subsystem from which you jumped.
- **EXIT** (or **X**) enables you to jump to the Sterling Gentran:Basic Logoff screen. This feature provides a quick and easy way to exit the Sterling Gentran system from any screen.

### User Defined Jump Code Table

The User Defined Jump Code Table is a user customizing tool that enables you to define your own jump code values. This facility requires a table that consists of the 10-character user code and the 10-character Sterling Gentran:Viewpoint jump code. It must be coded in an Assembler table, and the name of the table must be entered on the Configuration file (Record Type 0). An entry for the table name must be added to your CICS Resource Definitions.

When you enter a jump code, the system verifies that the jump code you entered is valid by first checking the User Defined Jump Code Table. If you have not defined a User Defined Jump Code

Table, or if the jump code you entered is not in that table, then the system checks the default jump code table.

See member EDIJUMP in the Sterling Gentran:Basic UTILITY.SOURCE PDS for help using the User Defined Jump Code table.

### Jump Code Guidelines

The Sterling Gentran:Basic system keeps independent position information for each subsystem (Partner, Standards, Databank, Security, and Mapping), as well as for all Sterling Gentran add-on products (Sterling Gentran:Plus, IBM® Sterling Gentran:Control®, Sterling Gentran:Realtime, and Sterling Gentran:Viewpoint). The independence of these subsystems enables you to jump or navigate from subsystem to subsystem without having to re-enter a key for that screen.

The general rules for using jump codes are as follows:

- You can "jump" only to screens that are directly accessible through selecting menu options.
- You can "jump" from any screen.
- Navigating or jumping to the Sterling Gentran Copyright/Signon screen, or exiting the Sterling Gentran system, clears the positions for all subsystems.
- After you "jump" from a subsystem to another subsystem, you can return directly to the screen you jumped from by typing **SWAP** in the jump code field.
- You cannot use "SWAP" to jump between screens within the same subsystem.
- Typing **SWAP** is the only method by which you can "jump" to a screen that has no jump code associated with it, as long as SWAP positioning has been established by jumping from one subsystem screen to a different subsystem screen.
- An invalid jump code causes the system to display the message "INVALID JUMP CODE ENTERED" on the current screen.
- You cannot "jump" to subsystems that are not installed, or for which you do not have security access. The message "INVALID JUMP - USER LACKS AUTHORITY" will be displayed on the current screen.

# Screen Descriptions

This chapter describes the purpose of each screen and how to use all their related functions. Each of the screens is described with the following format:

- Purpose
- Actions
- Function Keys
- Field Descriptions

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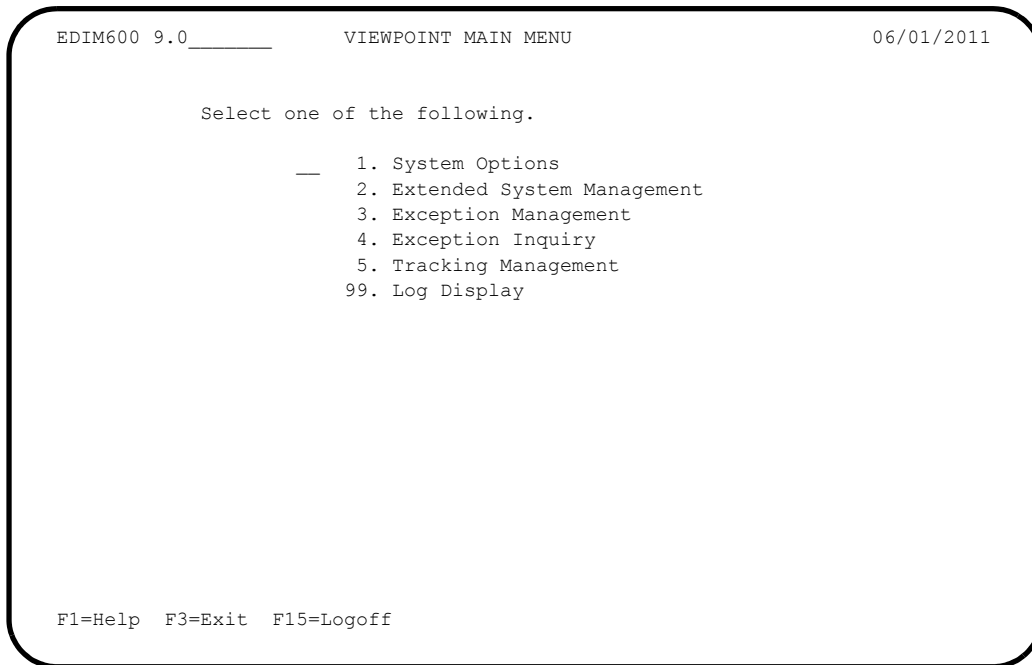
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## EDIM600 – Sterling Gentran:Viewpoint Main Menu

### Purpose

The Sterling Gentran:Viewpoint Main Menu provides direct access to the primary functions of the Sterling Gentran:Viewpoint product.

The following figure illustrates the Sterling Gentran:Viewpoint Main Menu.



The Sterling Gentran:Viewpoint Main Menu contains six options. The list of menu options, as well as a brief description of each option, is listed below.

Menu Option	Description
1. System Options	Provides global control for Sterling Gentran:Viewpoint processing.
2. Extended System Management	Provides administrative functions for defining and managing your Extended EDI System monitoring.
3. Exception Management	Provides setup and control for managing exceptions within your Extended EDI system.
4. Exception Inquiry	Provides end users with the tools needed to respond and resolve exceptions which have occurred in their EDI processing environment.
5. Tracking Management (optional)	Provides end users with query functions to search for an item travelling through the extended EDI environment.

Menu Option	Description
99. Log Display	Users may view all system messages generated by the Sterling Gentran:Viewpoint background CICS functions.

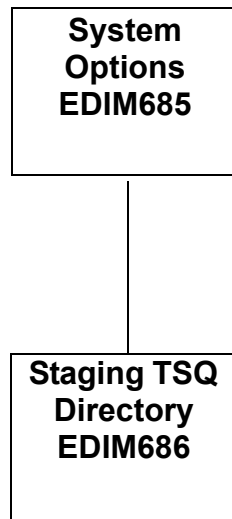


## **System Options Screens**

### **System Options Navigation**

This section contains detailed information on the System Options screens. The fields maintained in System Options and the effect they have on your system are explained.

The navigation for System Options is illustrated in Figure 5.1.



**Figure 5.1 System Options Navigation**

## EDIM685 – System Options Screen

### Purpose

The System Options screen allows you to control system functions dynamically.

Use the System Options screen to enable and disable Sterling Gentran:Viewpoint processing quickly in the event of environment problems or when system maintenance is required.

Some of the options which are controlled from System Options are enabling and disabling of the entire Sterling Gentran:Viewpoint system, enabling and disabling the trace function for all of Sterling Gentran:Viewpoint, and setting the scan interval of Sterling Gentran:Viewpoint's staging area.

Typical users of System Options will be Sterling Gentran:Viewpoint Administrator or EDI Coordinator.

```

EDIM685 9.1_____ VIEWPOINT – SYSTEM OPTIONS                                06/01/2011
Type Action, press Enter
  __ 2=Update  8=TSQDir

Description . . . VIEWPOINT_SYSTEM_OPTIONS _____
_____

System Status . . E      (E=Enable, D=Disable)
System Trace . . . E      (E=Enable, D=Disable)

Scan Interval . . 00 : 05 (HH:MM)

Error User Exit _____ Data _____

TRACKING USER EXIT _____

Staging File Control (E=Enable, D=Disable)
File  1  2  3  4  5  6  7  8  9 10 11 12 13 14 15 16 17 18 19 20
Status E  E  E  E  E  D  D  D  D  D  D  D  D  D  D  D  D  D  D  D
Full  T  T  T  T  T  T  T  T  T  T  T  T  T  T  T  T  T  T  T  T

Staging TSQ Full  T      (T=Terminate, C=Continue)

F1=Help  F3=Exit      F13=Start

```

### Actions

**2=Update** Enter **2** in the Action field and press **Enter** to update the current system options. The System Options are updated immediately, using the current screen field values.

**8=TSQDir** Enter **8** in the Action field and press **Enter** to display the Staging Temporary Storage Queue Directory.

### Function Keys

**F1=Help** If the cursor is not on a specific field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F13=Start** Starts the Sterling Gentran:Viewpoint Scanner. Confirmation is required. You can use this action to start Sterling Gentran:Viewpoint if the system has been disabled or if the initiation feature of CICS (Program Load Table, or PLT) has not been used to start the system. Enabling the system alone will not start Sterling Gentran:Viewpoint; you must also press F13.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. A screen jump code automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the following fields is entered by the user.

### (Action)

A 1-character field to request an action. Refer to **Actions** on the previous page for details regarding the available actions for this screen.

### Description

Two (2) lines of free form text to describe your Sterling Gentran:Viewpoint system.

### System Status

A 1-character field to enable and disable CICS processing for Sterling Gentran:Viewpoint.

- |          |   |
|----------|---|
| <b>E</b> | Enable. Sterling Gentran:Viewpoint processing continues at the scan interval specified. Enabling the system will not initiate a scan interval.  |
| <b>D</b> | Disable. Sterling Gentran:Viewpoint will not process the staging area. Sterling Gentran:Viewpoint Gateways will still accept data from tracking points into the staging area. The online screens are still available. Disabling the system causes processing to stop at the next scan interval. |

### System Trace

A 1-character field to control whether Sterling Gentran:Viewpoint messages from the Sterling Gentran:Viewpoint Post Processor should be written to the Online Log.

- |          |  |
|----------|--|
| <b>E</b> | Enable. Messages are written to the Online Log.      |
| <b>D</b> | Disable. Messages are not written to the Online Log. |

### Scan Interval

A 4-character field to specify the time interval between scanner executions. The format is HH:MM (hours:minutes).

**Error User Exit**

(Optional) A 1- to 8-character field to identify a user program that should be initiated by Sterling Gentran:Viewpoint when a fatal condition occurs in the Sterling Gentran:Viewpoint Scanner or Post Processor (for example: staging file full, post processor cannot continue (I/O error)).

For more details about the use of this option, refer to the “System Options – Error User Exit” in the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “User Exits and APIs” chapter.

**Data**

(Optional) A 1- to 20-character field passed to the Error User Exit program.

**Tracking User Exit**

(Only available for Tracking Management) A 1- to 4-character field to identify an online transaction ID for the Tracking User Exit program that is initiated by the Sterling Gentran:Viewpoint Post Processor. The Post Processor passes status information for each item processed.

For more details about the use of this option, refer to “Tracking User Exit” in the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “User Exits and APIs” chapter.

**Staging File Control****File**

The staging file number is displayed in this field. A maximum of 20 staging files may be implemented.

For details regarding the implementation of the staging area, refer to "Staging Files" in Chapter 2, "Developing a Configuration Strategy".

**Status**

A 1-character field entered by the user to specify the status for each staging file implemented. The status controls whether a staging file is available to receive tracking point data.

**E** Enable. The staging file is available to receive data from the Gateways and will be processed by the post-processor.

**D** Disable. The staging file is not available to receive data from the Gateways and will not be processed by the post-processor.

**Full**

A 1-character field entered by the user. This value determines how the Sterling Gentran:Viewpoint system responds to a tracking point when a request is made to process data which is destined for a full staging file. You control the action which is taken when a staging file full situation is encountered based on these indicators.

The options and impacts of the Staging File Full indicator are:

- T** Terminate. The Gateway returns a status code indicating that a fatal error has occurred. The tracking point will terminate immediately.
- C** Continue. The Gateway returns a status code indicating a file full situation. The Tracking Point will continue processing, but no data from that run will be available for Sterling Gentran:Viewpoint processing.

The Post Processor issues a Level 8 error message to the online log when a staging file full indicator is detected.

### **Staging TSQ Full**

A 1-character field entered by the user to control the online tracking points when an error occurs processing the Staging Temporary Storage Queue.

- T** Terminate. The Online Gateway returns a status code indicating that a fatal error has occurred. The tracking point will terminate immediately.
- C** Continue. The Online Gateway returns a status code indicating an error has occurred. The Tracking Point will continue processing, but no data from that run will be available for Sterling Gentran:Viewpoint processing.



**7=Disable** Enter **7** on the line of the Staging Temporary Storage Queue to be disabled and press **Enter**. The Staging Temporary Storage Queue is disabled. Sterling Gentran:Viewpoint will not process data from Staging Temporary Storage Queues that have been disabled.

Staging Temporary Storage Queues may occasionally need to be disabled to prevent the Sterling Gentran:Viewpoint Post Processor from processing the data. For example, when performing file maintenance on the Sterling Gentran:Viewpoint Repository, all Staging Temporary Storage Queues should be disabled until the required maintenance has been completed.

**8=Browse** Enter **8** on the line of the Staging Temporary Storage Queue to be browsed and press **Enter**. The Staging Temporary Storage Queue is browsed with the CICS supplied transaction CEBR. All of the normal browse functions of CEBR are available and you will return to the EDIM686 screen when you press PF3 from the CEBR screen.

### Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.
- F13=Purge** Deletes all Staging Temporary Storage Queues that have a record count of zero, a status of disabled, and are older than the specified purge interval. A confirmation message is displayed before the purge is performed. This is a quick alternative to performing many individual deletes.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. A screen jump code automatically appears in the jump code field for that screen.

To "jump" to another screen press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

#### TSQ ID

An 8-character field entered by the user. Control the entry displayed at the top of the list by entering the Staging Temporary Storage Queue required.

Staging Temporary Storage Queue names are comprised of the three character system image ("EDI"), followed by the letter "V" and then followed by four numeric digits (for example, EDIV0001).

**Status**

A 1-character field entered by the user to limit the list to a specific status.

- |              |   |
|--------------|---|
| <b>E</b>     | Enabled. Only Staging Temporary Storage Queues which are enabled are displayed.   |
| <b>D</b>     | Disabled. Only Staging Temporary Storage Queues which are disabled are displayed. |
| <b>blank</b> | All Staging Temporary Storage Queues are displayed.                               |

**Purge Interval**

The number of hours used to qualify Staging Temporary Storage Queues for the purge function.

**A (Action)**

A 1-character field entered by the user to request an action. Refer to **Actions** above for details regarding the available actions for this screen.

**TSQ ID**

The 8-character Staging Temporary Storage Queue ID.

**Date**

The date on which the Staging Temporary Storage Queue was created.

**Time**

The time on which the Staging Temporary Storage Queue was created.

**Records**

The number of records in the Staging Temporary Storage Queue.

**Status**

The current status of the Staging Temporary Storage Queue.

**Active**

The current status of the post processor associated with the Staging Temporary Storage Queue.

- |              |   |
|--------------|---|
| <b>blank</b> | The post processor has not been initiated.                                |
| <b>N</b>     | The post processor has been manually enabled or disabled via this screen. |
| <b>Y</b>     | The post processor has been initiated.                                    |

**Process**

The process name of the tracking point that created the staging Temporary Storage Queue.

**Tran/Task**

The CICS Transaction ID and Task Number that created the staging Temporary Storage Queue.



## Extended System Management Screens

### Extended System Management Navigation

This section contains detailed information on the Extended System Management Screens. The fields maintained in Extended System Management, and the effect they have on your system, are explained.

The navigation for Extended System Management is illustrated in Figure 5.2.

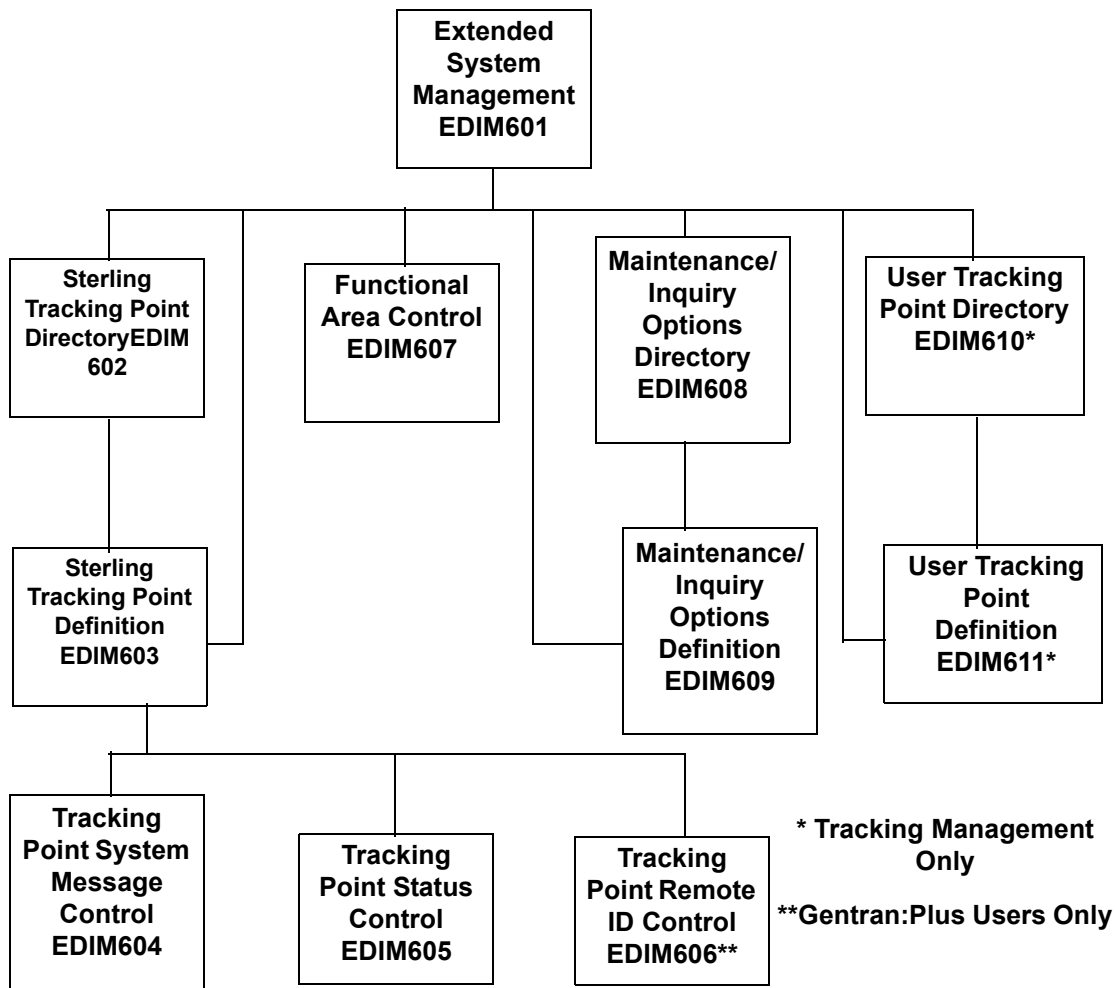


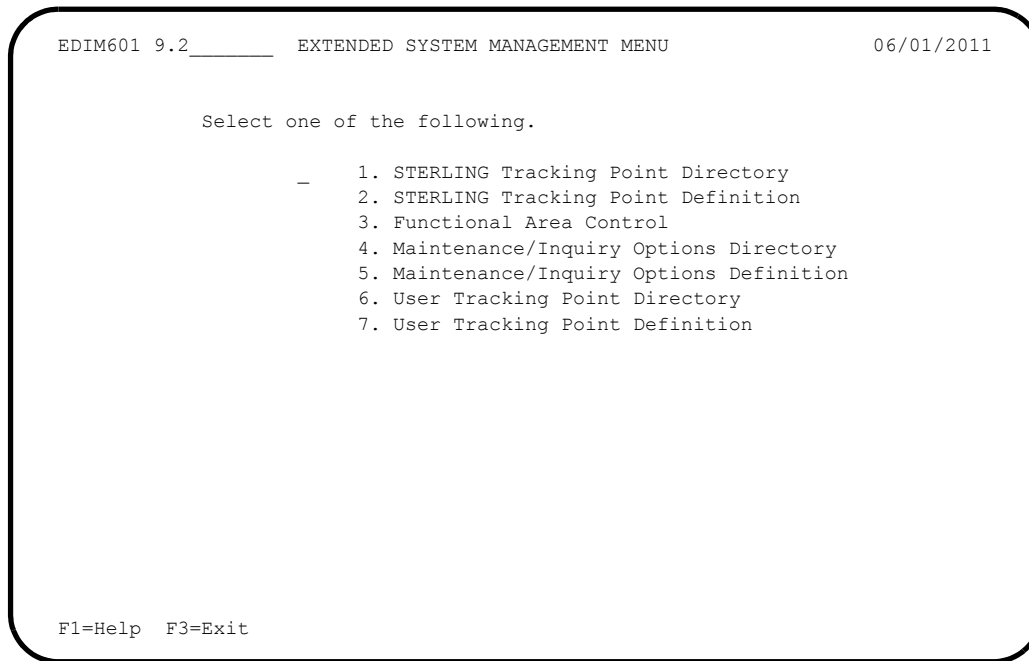
Figure 5.2 Extended System Management Navigation

## EDIM601 – Extended System Management Menu

### Purpose

The Extended System Management Menu provides you with direct access to the primary functions of Extended System Management. The typical users of the Extended System Management functions are the Sterling Gentran:Viewpoint Administrator, or EDI Coordinator.

The following figure illustrates the Extended System Management Menu:



The Extended System Management Menu contains seven options, which are listed below. The list of menu options, as well as a brief description of each option, follows.

Menu Option	Description
1. Sterling Tracking Point Directory	Provides a list of tracking points that have been defined to Sterling Gentran:Viewpoint. Current Sterling products that have been enabled for Sterling Gentran:Viewpoint include: Sterling Gentran:Basic, Sterling Gentran:Realtime, and Sterling Connect.
2. Sterling Tracking Point Definition	This option is used to define a Sterling tracking point. Tracking points may be defined for Sterling Gentran:Basic, Sterling Gentran:Realtime, and Sterling Connect.
3. Functional Area Control	Allows the Sterling Gentran:Viewpoint Administrator to enable and disable online Sterling Gentran:Viewpoint functional areas.

<b>Menu Option</b>	<b>Description</b>
4. Maintenance/Inquiry Options Directory	Provides a list of maintenance/inquiry options that have been defined to Sterling Gentran:Viewpoint.
5. Maintenance/Inquiry Options Definition	Allows you to define a set of Sterling Gentran:Viewpoint maintenance/inquiry options.
6. User Tracking Point Directory (optional)	Provides a list of user tracking points that have been defined to Sterling Gentran:Viewpoint. This is only available with the Tracking Management module.
7. User Tracking Point Definition (optional)	This option is used to define a user tracking point. This is only available with the Tracking Management module.

(optional) = Tracking Management only.

## EDIM602 – Sterling Tracking Point Directory Screen

### Purpose

The Sterling Tracking Point Directory allows you to list all tracking points defined to Sterling Gentran:Viewpoint. Defining a system/process (for example, Sterling Gentran/EBDI042) to Sterling Gentran:Viewpoint, as a tracking point, allows that system/process access to the Sterling Gentran:Viewpoint Gateways. Tracking points may be defined for Sterling Gentran:Basic, Sterling Gentran:Realtime, and Sterling Connect.

The typical user of these functions is your Sterling Gentran:Viewpoint Administrator or EDI Coordinator.

```

EDIM602 9.2.1_____ STERLING TRACKING POINT DIRECTORY 06/01/2011
Type Action, press Enter.
  1=Add  4=Delete  5=Select  6=Enable  7=Disable

System  CONNECT____
Process ALL_____
Status  _ (E=Enabled, D=Disabled)

A System      Process  Description                               Status
- CONNECT    ALL      CONNECT GENERAL TRACKING                 E
- CONNECT    EDIR314  CONNECT OUTBOUND INTERFACE               E
- CONNECT    EDIR316  CONNECT INBOUND INTERFACE                E
- CONNECT    MAILBOX  CONNECT COMMUNICATIONS PRODUCT           E
- CONNECT    STOUTL   CONNECT OFFLINE UTILITIES                E
- GENTRAN    ALL      GENTRAN GENERAL TRACKING                 E
- GENTRAN    EBDI001  GENTRAN INBOUND EDITOR                   E
- GENTRAN    EBDI002  GENTRAN OUTBOUND EDITOR                   E
- GENTRAN    EBDI041  GENTRAN INBOUND MAPPER                   E
- GENTRAN    EBDI042  GENTRAN OUTBOUND MAPPER                   E
- GENTRAN    EDID205  GENTRAN OUTBOUND EDI DATABANK EXTRACT    E
- GENTRAN    EDID255  REALTIME OUTBOUND EDI DATABANK EXTRACT    E

F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel

```

### Actions

**1=Add** Enter **1** on any line in the display list and press **Enter** to add a new Tracking Point Definition. The Tracking Point Definition screen is displayed with all entry fields blank.

**4=Delete** Enter **4** on the line of the tracking point to be deleted and press **Enter** to mark a Tracking Point Definition for deletion. The entry will be marked for deletion, and will be deleted the next time Sterling Gentran:Viewpoint Profiles Maintenance is run.

You can restore a tracking point definition from the archive file after maintenance has deleted it from the file. For detailed information on Profiles Maintenance, refer to “File Maintenance Procedures” in Chapter 2, “Operational Procedures”.

**Note:** A tracking point that has been marked for deletion displays the description “ENTRY HAS BEEN MARKED FOR DELETION” and may not be updated using the Online Facility.

- 5=Select** Enter **5** on the line of the Tracking Point and press **Enter** to select an existing Tracking Point Definition. The Tracking Point Definition screen for the tracking point selected is displayed.
- This selected tracking point screen may be used to either add a new tracking point, or to update the tracking point displayed.
- 6=Enable** Enter **6** on the line of the Tracking Point to be enabled, and press **Enter**. When a Tracking Point is enabled, the Sterling Gentran:Viewpoint Gateway *will* accept calls from that tracking point (that is, the tracking point will be monitored).
- 7=Disable** Enter **7** on the line of the Tracking Point to be disabled and press **Enter**. When a Tracking Point is disabled, the Sterling Gentran:Viewpoint Gateway will *not* accept calls from this tracking point (that is, the tracking point will not be monitored).

### Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. A screen jump code automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the next four fields is entered by the user:

#### System

A 1- to 10-character field. Control the entry displayed at the top of the list by entering the Tracking Point SYSTEM required. Partial names may be entered.

#### Process

A 1- to 8-character field. Control the entry displayed at the top of the list by entering the Tracking Point PROCESS required. Partial names may be entered.

#### Status

A 1-character field that limits the list to a single status.

- |              |   |
|--------------|---|
| <b>blank</b> | Both statuses are listed.                           |
| <b>E</b>     | Enabled. Only enabled tracking points are listed.   |
| <b>D</b>     | Disabled. Only disabled tracking points are listed. |

**A (Action)**

A 1-character field to request an action for a tracking point. Refer to **Actions** above for details regarding the available actions for this screen.

**System**

The system name of the tracking point.

**Process**

The process name of the tracking point.

**Description**

A description of the tracking point.

**Note:** A tracking point that has been marked for deletion displays the description “ENTRY HAS BEEN MARKED FOR DELETION”.

**Status**

The current status for the tracking point.

## EDIM603 – Sterling Tracking Point Definition Screen – Sterling Gentran

### Purpose

The Sterling Tracking Point Definition – Sterling Gentran Process screen allows you to define a Sterling Gentran Tracking Point with the options needed for that process. The Tracking Point Definition screen provides the definition of a Tracking Point to the Sterling Gentran:Viewpoint system.

You may define a Tracking Point as a general system (for example, Process – ALL), or define a Tracking Point as a specific process within a system (for example, System – Sterling Gentran, Process -EBDI042).

**Note:** Process-specific Tracking Point Definitions override general Tracking Point definitions.

Options which may be controlled for a Sterling Gentran Tracking Point are System Messages, Statuses, and Order By options. Refer to **Field Descriptions** below for details of these options.

```

EDIM603 9.2.2_____ STERLING TRACKING POINT DEFINITION 06/01/2011
Type Action, press Enter.
_ 1=Add 2=Update 4=Delete

System . . . . . GENTRAN___
Process . . . . . EDID510_
Description . . GENTRAN_ACKNOWLEDGEMENT_RECONCIL/MONITOR_____
Item Type(s) . . : TRANSACTION, FUNCTIONAL GROUP, INTERCHANGE, RUN
Status . . . . . E (E=Enabled, D=Disabled)

Tracking Point Control
System Message A (A=All, N=None, D=Detail)
Status . . . . . A (A=All, N=None, D=Detail)

Order By Control
System . . . . . Y (Y=Yes, N=No)
Process . . . . . Y (Y=Yes, N=No)
Values . . . . . _____ (F4=Prompt)

F1=Help F3=Exit F4=Prompt F10=F1dDt1 F12=Cancel

```

### Actions

- 1=Add** Enter **1** and press **Enter** to add a new Tracking Point Definition to Sterling Gentran:Viewpoint. If the tracking point already exists, an error message is displayed and the tracking point is not added.
- 2=Update** Enter **2** and press **Enter** to update a Tracking Point Definition. The tracking point definition will be updated in Sterling Gentran:Viewpoint using the current field values.
- When the action is complete, the screen will redisplay with a message indicating that the tracking point definition has been updated. If the entry does not exist, the

screen will redisplay with a message indicating that the tracking point definition was not found.

**4=Delete** Enter **4** and press **Enter** to mark a tracking point definition for deletion. The tracking point will be marked for deletion and will be deleted the next time Profiles Maintenance runs.

You can restore a tracking point definition from the archive file after maintenance has deleted it from the file. For detailed information on Tracking Point Maintenance, refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** A tracking point that has been marked for deletion may not be updated from the Online Facility.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F4=Prompt** Displays a selection list of values available for the field on which the cursor is currently located. The prompt function is only available on fields marked with **F4=Prompt**.

**F10=FldDtl** Display the control detail screen for the field the cursor is on. This function key is only valid for fields which have D (Detail) as a valid value.

**F12=Cancel** Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the following fields is entered by the user:

### (Action)

A 1-character field to request an action for the tracking point. Refer to Actions above for details on the available actions for this screen.

### System

A 1- to 10-character field used in conjunction with Process to specify the tracking point.

### Process

A 1- to 8-character field used in conjunction with System to specify the tracking point.

**ALL** All Sterling Gentran:Viewpoint enabled processes for the system.

**EDID205** Outbound EDI Databank Extract



<b>EDID405</b>	Inbound Application Databank Extract
<b>EDID510</b>	Acknowledgement Reconciliation/Monitor
<b>EDID850</b>	Network Reconciliation
<b>EBDI001</b>	Inbound Editor
<b>EBDI002</b>	Outbound Editor
<b>EBDI041</b>	Inbound Mapper
<b>EBDI042</b>	Outbound Mapper
<b>EDID255</b>	Sterling Gentran:Realtime Outbound EDI Databank Extract
<b>EDID455</b>	Sterling Gentran:Realtime Inbound Application Databank Extract
<b>EDID515</b>	Sterling Gentran:Realtime Acknowledgement Reconciliation/Monitor
<b>EDIR001</b>	Sterling Gentran:Realtime Inbound Editor
<b>EDIR002</b>	Sterling Gentran:Realtime Outbound Editor
<b>EDIR041</b>	Sterling Gentran:Realtime Inbound Mapper
<b>EDIR042</b>	Sterling Gentran:Realtime Outbound Mapper

**Description**

A 1- to 45-character field to describe the tracking point.

**Item Type(s)**

Item Types for Sterling Gentran tracking points are pre-defined and displayed in this field.

<b>Document</b>	<ul style="list-style-type: none"><li>• Inbound Mapper (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li><li>• Outbound Mapper (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li><li>• Inbound Application Databank Extract (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li></ul>
<b>Functional Group</b>	<ul style="list-style-type: none"><li>• Inbound Editor (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li><li>• Outbound Editor (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li><li>• Outbound EDI Databank Extract (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li><li>• Acknowledgement Reconciliation/Monitor (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li></ul>

- |                    |  |
|--------------------|--|
| <b>Interchange</b> | <ul style="list-style-type: none"> <li>• Inbound Editor (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li> <li>• Outbound Editor (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li> <li>• Outbound EDI Databank Extract (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li> <li>• Acknowledgement Reconciliation/Monitor (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li> <li>• Network Reconciliation</li> </ul> |
| <b>Run</b>         | <ul style="list-style-type: none"> <li>• All Sterling Gentran Processes</li> </ul>   |
| <b>Transaction</b> | <ul style="list-style-type: none"> <li>• Inbound Editor (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li> <li>• Outbound Editor (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li> <li>• Outbound EDI Databank Extract (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li> <li>• Acknowledgement Reconciliation/Monitor (Sterling Gentran:Basic and Sterling Gentran:Realtime)</li> </ul>                                   |

**Status**

A 1-character field to enable or disable the tracking point.

- |          |   |
|----------|---|
| <b>E</b> | Enabled. While a tracking point is enabled, Sterling Gentran:Viewpoint Gateways <i>will</i> accept calls from the tracking point (that is, the tracking point will be monitored).           |
| <b>D</b> | Disabled. While a tracking point is disabled, Sterling Gentran:Viewpoint Gateways <i>will not</i> accept calls from the tracking point (that is, the tracking point will not be monitored). |

**Tracking Point Control**

**System Message**

A 1-character field entered by the user to indicate the level of system message control that should be used for the tracking point.

With the cursor in this field, press **F10=F1dDtI** to display the Tracking Point System Message Control screen (EDIM604).

- |          |   |
|----------|---|
| <b>A</b> | <b>All.</b> All system messages for the tracking point are available for use in setting up Sterling Gentran:Viewpoint profiles and definitions. A setting of <b>A</b> (All) will override any Detail that has been defined. |
| <b>N</b> | <b>None.</b> Specifies that system messages cannot be used when setting up Sterling Gentran:Viewpoint profiles and definitions. A setting of <b>N</b> (None) will override any Detail previously entered.                   |
| <b>D</b> | <b>Detail.</b> A value of <b>D</b> (Detail) includes or excludes a specific range and/or list of system messages for use in Sterling Gentran:Viewpoint. A setting   |

of **D** (Detail) requires details to be entered from the Tracking Point System Message Control screen (EDIM604).

**Status**

A 1-character field entered by the user to indicate the level of status control that should be used for the tracking point.

With the cursor in this field, press **F10=FldDtl** to display the Tracking Point Status Control screen (EDIM605).

- A All.** All statuses for the tracking point are available for use in setting up Sterling Gentran:Viewpoint profiles and definitions. A setting of **A** (All) will override any Detail previously entered.
- N None.** A value of **N** (None) disallows any use of statuses for the tracking point in Sterling Gentran:Viewpoint. A setting of **N** (None) will override any Detail previously entered.
- D Detail.** A value of **D** (Detail) includes or excludes a specific tracking points statuses for use in Sterling Gentran:Viewpoint. A setting of **D** (Detail) requires details to be entered on the Tracking Point Status Control screen (EDIM605).

**Order By Control**

Order By Control allows you to specify which fields should be used to sort exceptions captured for the Tracking Point. Exception Inquiry users have exceptions listed in ascending order of the fields defined here.

An example of using the "Order By" option would be a user requiring all documents (exceptions), processed by the Inbound Mapper to be ordered by Application and Partner. You would specify **N** (No) to System, **N** (No) to Process and Application in the first "Order By" field, and Partner in the second "Order By" field. In Exception Inquiry, you would then have all documents listed by Application and Partner.

**System**

- Y Yes.** A value of **Y** (Yes) will include the system name as the first field for ordering.
- N No.** The system name will not be included in ordering if **N** (No) is specified.

**Process**

- Y Yes.** A value of **Y** (Yes) will include the process name as the second field for ordering.
- N No.** The process name will not be included in ordering if **N** (No) is specified.

**Values**

A 1- to 15-character field entered by the user to specify the order of exceptions in Exception Inquiry.

A maximum of 3 fields may be specified. When the cursor is on any of these fields, the **F4=Prompt** function key may be used to display a selection list of valid "Order By"

values for the tracking point (system/process). If System and/or Process are set to **Y** (Yes) then the "Values" fields are used for ordering within System and/or Process.

<b>APPLICATION</b>	Application ID
<b>ENVELOPE REF</b>	Envelope Reference IDs
<b>PARTNER</b>	Partner
<b>PARTNER QUAL</b>	Partner Qualifier
<b>PROCESSED DTTM</b>	Processed Date/Time
<b>NETWORK</b>	Network ID
<b>USER</b>	User
<b>USER REFERENCE</b>	User Reference

## EDIM603 – Sterling Tracking Point Definition Screen – Sterling Connect

### Purpose

Sterling Connect Tracking points may only be used by Sterling Gentran:Plus users with Sterling Connect.

The Sterling Tracking Point Definition – Sterling Connect Process allows you to define a Sterling Connect Tracking Point with the options needed for that process. The Tracking Point Definition screen provides the definition of a Tracking Point to the Sterling Gentran:Viewpoint system.

You may define a Tracking Point as a general system (for example, Process – ALL), or define a Tracking Point as a specific process within a system (for example, System – Sterling Connect, Process – MAILBOX).

**Note:** Process-specific Tracking Point definitions override general Tracking Point definitions.

Options which may be controlled for a Sterling Connect Tracking Point are tracking by Remote ID and Order By options. Refer to **Field Descriptions** below for details of these options.

```

EDIM603 9.2.2_____ STERLING TRACKING POINT DEFINITION 06/01/2011
Type Action, press Enter.
_ 1=Add 2=Update 4=Delete

System . . . . . CONNECT____
Process . . . . . MAILBOX__
Description . . . . . CONNECT_COMMUNICATIONS_PRODUCT_____
Item Type(s) . . : BATCH
Status . . . . . E (E=Enabled, D=Disabled)

Tracking Point Control
System Message _ (A=All, N=None, D=Detail)
Status . . . . . _ (A=All, N=None, D=Detail)
MBX/RMT ID . . . A (A=All, D=Detail)

Order By Control
System . . . . . Y (Y=Yes, N=No)
Process . . . . . Y (Y=Yes, N=No)
Values . . . . . _____ (F4=Prompt)

User Log Exit _____

F1=Help F3=Exit F4=Prompt F10=FldDt1 F12=Cancel
    
```

### Actions

- 1=Add** Enter **1** and press **Enter** to add a new Tracking Point Definition to Sterling Gentran:Viewpoint. If the tracking point already exists, an error message is displayed and the tracking point is not added.
- 2=Update** Enter **2** and press **Enter** to update a Tracking Point Definition. The tracking point definition will be updated in Sterling Gentran:Viewpoint using the current field values.

When the action is complete, the screen redisplay with a message indicating that the tracking point definition has been updated. If the entry does not exist, the screen redisplay with a message indicating the tracking point definition was not found.

**4=Delete** Enter **4** and press **Enter** to mark a Tracking Point Definition for deletion. The tracking point is marked for deletion, and will be deleted the next time Profiles Maintenance runs.

A Tracking Point Definition can be restored from the archive file after maintenance has deleted it from the file. For detailed information on Tracking Point Maintenance, refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** A tracking point that has been marked for deletion may not be updated from the Online Facility.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F4=Prompt** Displays a selection list of values available for the field on which the cursor is currently located. The prompt function is only available on fields marked with **F4=Prompt**.

**F10=FldDtl** Display the control detail screen for the field the cursor is on. This function key is only valid for fields which have **D** (Detail) as a valid value.

**F12=Cancel** Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the next five fields is entered by the user:

### (Action)

A 1-character field to request an action for the tracking point. Refer to **Actions** above for details regarding the available actions for this screen.

### System

A 1-to 10-character field used in conjunction with Process to specify the tracking point. For communications tracking, specify the system as "CONNECT".

### Process

A 1-to 8-character field used in conjunction with System to specify the tracking point.

**ALL** General Sterling Connect Tracking

<b>STOUTL</b>	Sterling Connect Offline Utilities
<b>MAILBOX</b>	Sterling Connect Communications Product
<b>EDIR314</b>	Sterling Connect Outbound Interface
<b>EDIR316</b>	Sterling Connect Inbound Interface

**Description**

A 1- to 45-character field used to describe the tracking point.

**Item Type(s)**

Item Types for Sterling Connect tracking points are pre-defined and are displayed in this field.

<b>Batch</b>	All Sterling Connect Processes
<b>Run</b>	<ul style="list-style-type: none"><li>• Sterling Connect Offline Utilities</li><li>• Sterling Connect Outbound Interface</li><li>• Sterling Connect Inbound Interface</li></ul>

**Status**

A 1-character field used to enable or disable the tracking point.

<b>E</b>	Enabled. For the active communications task (Sterling Connect), the tracking point passes information to Sterling Gentran:Viewpoint by writing Log Exit records to the Sterling Gentran:Viewpoint Communications Queue.
<b>D</b>	Disabled. For the active communications task (Sterling Connect), the tracking point will <i>not</i> pass information to Sterling Gentran:Viewpoint. By disabling Sterling Connect, Log Exit records are not written to the Sterling Gentran:Viewpoint Communications Queue.

**Note:** Use this field to suspend Sterling Gentran:Viewpoint communications monitoring, as required.

**Tracking Point Control**

**System Message**

This field is not required for Sterling Connect tracking points.

**Status**

This field is not required for Sterling Connect tracking points.

**MBX/RMT ID**

A 1-character field entered by the user to indicate the level of Remote ID control that should be used for the tracking point. Press **F10=F1dDt1** with the cursor in this field to display the Tracking Point MBX/Remote ID Control screen (EDIM606).

- A**     **All.** Data for all communications remote IDs are monitored in Sterling Gentran:Viewpoint. A setting of **A** (All) will override any Detail previously entered.
- D**     **Detail.** D (Detail) includes or excludes data from specific communications remote IDs from being monitored in Sterling Gentran:Viewpoint. A setting of **D** (Detail) requires specific remote IDs to be entered on the Tracking Point Remote ID Control screen (EDIM606). Press **F10=FldDtl** to display the Tracking Point Remote ID Control screen.

**Order By Control**

Order By Control allows you to specify which fields should be used to sort exceptions that are captured for the Tracking Point. Exception Inquiry users will have exceptions listed in ascending order of the fields defined here.

An example of using the "Order By" option would be a user requiring all batches (exceptions) which are processed by communications to be ordered by Remote ID and Batch ID. You would specify **N** (No) to System, **N** (No) to Process and Remote ID in the first "Order By" field, and Batch ID in the second "Order By" field. In Exception Inquiry, you would then have all your batches listed by Remote ID and Batch ID.

**System**

- Y**     **Yes.** A value of **Y** (Yes) will include the system name as the first field for ordering.
- N**     **No.** The system name will not be included in ordering if **N** (No) is specified.

**Process**

- Y**     **Yes.** A value of **Y** (Yes) will include the process name as the second field for ordering.
- N**     **No.** The process name will not be included in ordering if **N** (No) is specified.

**Values**

A 1- to 15-character field entered by the user to specify the order of exceptions in Exception Inquiry.

You may specify a maximum of 3 fields. Use the **F4=Prompt** function key when the cursor is on any of these fields to display a selection list of valid "Order By" values for the tracking point (system/process). If System and/or Process are set to **Y** (Yes) then the "Values" fields will be used for ordering within System and/or Process.

<b>BATCH ID</b>	Batch ID
<b>BATCH NUMBER</b>	Batch Number
<b>PROCESSED DTTM</b>	Processed Date/Time
<b>REMOTE ID</b>	Remote ID

**User Log Exit**

A 1- to 8-character field entered by the user to specify the ID of a User Log Exit program to be called by the Sterling Connect Log Exit (EDIVLXU).



For Sterling Gentran:Plus users who have currently implemented a User Log Exit Program, the user program ID should be specified in this field.

In the Sterling Connect Options Definition File, the program EDIVLXU must be specified as the Log Exit program.

Refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “Batch Program Descriptions” chapter for more information on this program.

**Note:** This field is only displayed when the System is Sterling Connect and the Process is Mailbox.

## EDIM604 – Tracking Point System Message Control Screen

### Purpose

The Tracking Point System Message Control screen is only available for defining Sterling Gentran tracking points.

The Tracking Point System Message Control screen allows you to specify which system messages should be available for use by Capture Definitions.

```

EDIM604 _____ TRACKING POINT SYSTEM MESSAGE CONTROL          06/01/2011
Type Action, press Enter.
  _ 2=Update

System . . . : GENTRAN
Process  : EDID510
Description: GENTRAN ACKNOWLEDGEMENT RECONCIL/MONITOR

Control Mode I (E=Exclude, I=Include)

Range . . . 000000 To 999999

List . . . . _____
                _____
                _____
                _____
                _____
                _____
                _____

F1=Help  F3=Exit  F12=Cancel
    
```

### Actions

**2=Update** Enter **2** in the Action field and press **Enter** to update the Tracking Point Definition. The tracking point definition will be updated in Sterling Gentran:Viewpoint using the current screen field values. When the action is complete, the screen redisplay with a message indicating that the Tracking Point System Message Control has been updated.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1-character field entered by the user to request an action for the tracking point. Refer to Actions above for details regarding the available actions for this screen.

### System

The tracking point system name is displayed in this field.

### Process

The tracking point process name is displayed in this field.

### Description

The tracking point description is displayed in this field.

### Control Mode

A 1-character field entered by the user to indicate whether specified system messages should be included or excluded for use by Capture Definitions.

**I**                    Include messages specified.

**E**                    Exclude messages specified.

### Range

Two 6-character fields entered by the user to include or exclude a range of tracking point system messages for Sterling Gentrans:Viewpoint processing. The first field specifies the beginning of the range of messages, and the second field specifies the end of the range.

### List

Forty 6-character fields entered by the user to include or exclude a list of tracking point system messages for use by Capture Definitions.

**Note:** To include or exclude system messages, either specify a range or specify a list of messages.

## EDIM605 – Tracking Point Status Control Screen

### Purpose

The Tracking Point Status Control screen is only available for defining Sterling Gentran tracking points.

The Tracking Point Status Control screen allows you to select specific tracking point statuses which you want to be available for Sterling Gentran:Viewpoint profiles and definitions.

```

EDIM605 _____ TRACKING POINT STATUS CONTROL 06/01/2011
Type Action, press Enter.
_ 2=Update

System . . . . . : GENTRAN
Process . . . . . : EDID510
Description . . . . : GENTRAN ACKNOWLEDGEMENT RECONCIL/MONITOR

Status List (Y=Yes, N=No)
Acknowledgement . . Y
Compliance . . . . Y
Envelope Validation Y
Mapping Validation Y
Network . . . . . Y
Sequence . . . . . Y

F1=Help F3=Exit F12=Cancel

```

### Actions

**2=Update** Enter **2** in the Action field and press **Enter** to update a Tracking Point Definition. The tracking point definition will be updated in Sterling Gentran:Viewpoint, using the current screen field values. The screen will re-display with a message indicating the Tracking Point Status Control has been updated.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed, if the cursor is not on a field. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for the screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

**(Action)**

A 1-character field entered by the user to request an action for a tracking point. Refer to **Actions** above for details regarding the available actions for this screen.

**System**

The tracking point system name is displayed in this field.

**Process**

The tracking point process name is displayed in this field.

**Description**

The tracking point description is displayed in this field.

**Status List**

A 1-character field entered by the user to make specific tracking point statuses available to Sterling Gentran:Viewpoint profiles and definitions. If all statuses are to be set to **Y=Yes** or **N=No** then this screen may be overridden from the Tracking Point Definition screen by specifying **ALL** or **NONE** for Status on the Tracking Point Definition screen.

<b>Y</b>	Yes. Make this tracking point status available.
<b>N</b>	No. Do not make this tracking point status available.

## EDIM606 – Tracking Point Mailbox/Remote ID Control Screen

### Purpose

The Tracking Point Mailbox/Remote ID Control screen is only available for defining Sterling Connect tracking points.

The Tracking Point Mailbox/Remote ID Control screen allows you to specify which Remote IDs should be monitored by Sterling Gentran:Viewpoint.

```

EDIM606 _____ TRACKING POINT MAILBOX/REMOTE ID CONTROL 06/01/2011
Type Action, press Enter.
  _ 2=Update

System . . . : CONNECT
Process   : STOUTL
Description: CONNECT OFFLINE UTILITIES

Control Mode I (E=Exclude, I=Include)

List . . . . REMOTE1_ _____
                _____
                _____
                _____
                _____
                _____
(PF4=Prompt)

F1=Help  F3=Exit  F4=Prompt  F12=Cancel

```

### Actions

**2=Update** Enter **2** in the Action field and press **Enter** to update the Tracking Point Definition. The tracking point definition will be updated in Sterling Gentran:Viewpoint using the current screen field values. When the action is complete, the screen will be redisplayed with a message indicating that the Tracking Point Remote ID Control Screen has been updated.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F4=Prompt** Displays a selection list of values available for the field on which the cursor is currently located. The prompt function is only available on fields marked with **F4=Prompt**.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1-character field entered by the user to request an action for the tracking point. Refer to **Actions** above for details regarding the available actions for this screen.

### System

The tracking point system name is displayed in this field.

### Process

The tracking point process name is displayed in this field.

### Description

The tracking point description is displayed in this field.

### Control Mode

A 1-character field entered by the user to indicate whether the specified Remote IDs should be included or excluded for use by Sterling Gentran:Viewpoint.

- |          |                               |
|----------|-------------------------------|
| <b>I</b> | Include Remote IDs specified. |
| <b>E</b> | Exclude Remote IDs specified. |

### List

Thirty 8-character fields entered by the user to include or exclude a list of Remote IDs for use by Sterling Gentran:Viewpoint. Use the **F4=Prompt** to obtain a list of available Remote IDs. The Remote IDs from the F4=Prompt feature is obtained from the Sterling Gentran:Plus Remote File.

## EDIM607 – Functional Area Control Screen

### Purpose

The Functional Area Control screen allows you to enable or disable an entire group of Sterling Gentran:Viewpoint functions.

Functional Area Control is normally used by the Administrator to temporarily restrict you from making changes in the Sterling Gentran:Viewpoint online environment.

```

EDIM607 9.2.3_____  FUNCTIONAL AREA CONTROL  06/01/2011
Type Action, press Enter.
  6=Enable  7=Disable

A  Functional Area          Status
-  EXCEPTION MANAGEMENT    E
-  EXCEPTION INQUIRY       E
-  TRACKING MANAGEMENT     D

F1=Help  F3=Exit  F12=Cancel

```

### Actions

**6=Enable** Enter **6** on the line of the functional area to be enabled and press **Enter**. When a functional area is enabled, the functional area is available for use by the Sterling Gentran:Viewpoint user.

**7=Disable** Enter **7** on the line of the functional area to be disabled, and press **Enter**. When a functional area is disabled, the functional area is not available for use by the Sterling Gentran:Viewpoint user.

If a Functional Area is disabled while you are in that Functional Area, pressing the Enter key will return you to the Sterling Gentran:Viewpoint Main Menu. The Main Menu will display a message indicating that the Functional Area has been disabled.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.



## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### A (Action)

A 1-character field entered by the user to request an action for a functional area. Refer to **Actions** above for details regarding the available actions for this screen.

### Functional Area

The functional area name is displayed in this field.

<b>Exception Management</b>	Provides setup and control for managing exceptions within your Extended EDI system.
<b>Exception Inquiry</b>	Provides end users with the tools needed to respond and resolve exceptions which have occurred in their EDI processing environment
<b>Tracking Management</b>	Provides end users with query functions to search for an item travelling through the extended EDI environment. <b>Note:</b> This field is only displayed if Tracking Management has been installed.

### Status

The current status, enabled or disabled, for the functional area is displayed in this field.

## EDIM608 – Maintenance/Inquiry Options Directory Screen

### Purpose

The Maintenance/Inquiry Options Directory provides you with a list of all the Maintenance/Inquiry options definitions that have been created in Sterling Gentran:Viewpoint.

Maintenance/Inquiry options are used to control how the maintenance/inquiry programs should maintain and inquire against the Sterling Gentran:Viewpoint Repository and Profiles for Exception Management, and also against the Sterling Gentran:Viewpoint Master Index for Tracking Management.

```

EDIM608 9.2.4_____ MAINTENANCE/INQUIRY OPTIONS DIRECTORY          06/01/2011
Type Action, press Enter
  1=Add  4=Delete  5=Select  6=Enable  7=Disable

File . . . _ (R=Repository, P=Profile)
Identifier @MODEL-MT1
Status . . _ (E=Enabled, D=Disabled)

A Identifier Description                               File      Status
- @MODEL-MT1 REPOSITORY MAINTENANCE - EXCEPTIONS      REPOSITORY E
- @MODEL-MT2 REPOSITORY MAINTENANCE - TRACKING        REPOSITORY E
- @MODEL-MT3 PROFILE MAINTENANCE - EXCEPTIONS        PROFILE   E
- @MODEL-MT4 PROFILE MAINTENANCE - TRACKING          PROFILE   E
- @MODEL-MT5 PROFILE MAINTENANCE - SYSTEM            PROFILE   E
- @MODEL-P LIST ALL EXCEPTION PROFILES                PROFILE   E
- @MODEL-R LIST EXCEPTIONS FOR PARTNER VENDOR-1      REPOSITORY E
- @MODEL-TP LIST ALL USER TRACKING POINTS            PROFILE   E
- @MODEL-TR LIST ALL TRACKED ITEMS FOR VENDOR-2      REPOSITORY E
-
-
-
LAST ENTRY DISPLAYED
F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel

```

### Actions

**1=Add** Enter **1** on any line in the list and press **Enter** to add a new Maintenance/Inquiry Options Definition. The Maintenance/Inquiry Options Definition screen is displayed with all entry fields blank.

**4=Delete** Enter **4** on the line of the entry to be deleted and press **Enter** to mark a Maintenance/Inquiry Options Definition for deletion. The entry is marked for deletion, and will be deleted the next time Sterling Gentran:Viewpoint Profiles Maintenance runs.

A definition can be restored from the archive file after maintenance has deleted it from the file. For more information on Profiles Maintenance, refer to “File Maintenance Procedures” in Chapter 2, “Operational Procedures”.

**Note:** A Maintenance/Inquiry Options Definition that has been marked for deletion is displayed with the description “ENTRY HAS BEEN MARKED FOR DELETION” and may not be updated.

- 5=Select** Enter **5** on the line of the entry to be selected and press **Enter** to select an existing Maintenance/Inquiry Options Definition. The Maintenance/Inquiry Options Definition screen is displayed for the Maintenance/Inquiry Options Definition selected.
- This screen may be used to add a new Maintenance/Inquiry Options Definition, or update the Maintenance/Inquiry Options selected.
- 6=Enable** Enter **6** on the line of the Maintenance/Inquiry Options Definition to be enabled and press **Enter**. When a Maintenance/Inquiry Options Definition is enabled, it may be used by the Sterling Gentran:Viewpoint Maintenance/Inquiry program.
- 7=Disable** Enter **7** on the line of the Maintenance/Inquiry Options Definition to be disabled and press **Enter**. When a Maintenance/Inquiry Options Definition is disabled, it may not be used by the Sterling Gentran:Viewpoint Maintenance/Inquiry program.

### Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the next four fields is entered by the user:

#### File

A 1-character field which limits the directory to a list of definitions for a single file.

- |              |                                    |
|--------------|------------------------------------|
| <b>blank</b> | All definitions are listed.        |
| <b>R</b>     | Repository definitions are listed. |
| <b>P</b>     | Profile definitions are listed.    |

#### Identifier

A 1- to 10-character field to control where the list of definitions should start.

**Status**

A 1-character field used to limit the list to a single status.

<b>blank</b>	Both statuses are listed.
<b>E</b>	Enabled. Only enabled Maintenance/Inquiry Options are listed.
<b>D</b>	Disabled. Only disabled Maintenance/Inquiry Options are listed.

**A (Action)**

A 1-character field to request an action for a Maintenance/Inquiry Options Definition. Refer to **Actions** above for details regarding the available actions for this screen.

**Identifier**

The identifier of the definition is displayed in this field.

**Description**

The description of the definition is displayed in this field.

**Note:** A definition that has been marked for deletion will display the description “ENTRY HAS BEEN MARKED FOR DELETION”.

**File**

The file name of the file, which the Maintenance/Inquiry Options Definition is used for, is displayed in this field.

**Status**

The current status of the definition is displayed in this field.

## EDIM609 – Maintenance/Inquiry Options Definition Screen

### Purpose

The Maintenance/Inquiry Options Definition screen allows you to define a set of selection criteria which can be used by the Maintenance/Inquiry programs for maintaining and inquiring against Sterling Gentran:Viewpoint files. Refer to the program “EDIN140 – Maintenance/Inquiry” in the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* “Batch Program Descriptions” chapter.

For each file, a model definition is provided as an example that may be used to create your own maintenance definitions.

```

EDIM609 9.2.5_____ MAINTENANCE/INQUIRY OPTIONS DEFINITION      06/01/2011
Type Action, press Enter.
  _ 1=Add 2=Update 4=Delete

Identifier  @MODEL-MT1
Description REPOSITORY_MAINTENANCE_-_EXCEPTIONS_____
Status . . . E (E=Enabled, D=Disabled)

Operation (F4=Prompt)
File . . . REPOSITORY          Class . . . EXCEPTIONS
Mode . . . PURGE___           Report Level BOTH___

Selection Criteria (F4=Prompt)
Field              Op  Value                               Con.
AGE_OPEN_____   GT  005_____                               OR_
AGE_CLOSED_____  GT  005_____                               OR_
AGE_REVIEWED_____GT  005_____                               OR_
AGE_TRANSFERRED___GT  005_____                               OR_
ONLINE_DELETES____EQ  YES_____                               OR_
ONLINE_DELETE_RECPT_ EQ  YES_____                               ___
_____           ___  _____                               _____

F1=Help  F3=Exit  F4=Prompt  F12=Cancel

```

### Actions

- 1=Add** Enter **1** and press **Enter** to add a new Maintenance/Inquiry Options Definition. The Maintenance/Inquiry Options Definition will be added to Sterling Gentran:Viewpoint. If the Maintenance/Inquiry Options Definition already exists, an error message is displayed and the Maintenance/Inquiry Option will not be added.
- 2=Update** Enter **2** and press **Enter** to update a Maintenance/Inquiry Options Definition. The Maintenance/Inquiry Options Definition will be updated in Sterling Gentran:Viewpoint, using the current screen field values.
- When the action is complete, the screen will redisplay with a message indicating that the Maintenance/Inquiry Options Definition has been updated. If the entry does not exist, the screen will redisplay with a message indicating that the Maintenance/Inquiry Options Definition was not found.

**4=Delete** Enter **4** and press **Enter** to mark a Maintenance/Inquiry Options Definition for deletion. The Maintenance/Inquiry Options Definition is marked for deletion, and will be deleted the next time Profiles Maintenance is run.

For more information on Profiles Maintenance, refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** A Maintenance/Inquiry Options definition that has been marked for deletion may not be updated from the Online Facility.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F4=Prompt** Displays a selection list of values available for the field on which the cursor is currently located. The prompt function is only available on fields marked with **F4=Prompt**.

**F12=Cancel** Back up in the dialog, one screen at a time. No update is performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the following fields is entered by the user:

### (Action)

A 1-character field to request an action for the Maintenance Options Definition. Refer to **Actions** above for details regarding the available actions for this screen.

### Identifier

A 1- to 10-character field to identify the definition that should be added (new) or viewed/updated/deleted (existing). This value is specified in the procedure used for running Maintenance/Inquiry.

### Description

A 1- to 45-character field to describe the maintenance/inquiry options for this definition.

### Status

A 1-character field to specify the status of the definition.

**E** Enabled. Maintenance/Inquiry runs will process the file using the definition.

**D** Disabled. Maintenance/Inquiry runs will not process the file using the definition. The maintenance run will terminate with a message indicating the Maintenance/Inquiry Options Definition specified has been disabled.

### File

A 1- to 10-character field to identify the file to which the Maintenance/Inquiry options apply.

**Repository** Repository and Master Index Files

**Profile** Profile File

### Class

A 1- to 10-character field to specify the Class of the definition. Class identifies if the purge/inquiry selection criteria should be used to find system defined options, exceptions that have been captured by Exception Management, or items that are being monitored by the Tracking Management module. The Class is combined with the File specified to identify what your selection criteria should be applied to.

**Exceptions** Exceptions that have been captured by Exception Management.

**System** System defined profile options.

**Tracking** Tracking items that are being monitored by Tracking Management.

### Mode

A 1- to 7-character field to indicate the mode in which Maintenance/Inquiry should operate.

**Purge** Purge all objects that satisfy the selection criteria. Archive is not performed.

**Archive** Purge and archive all objects that satisfy the selection criteria.

**Inquiry** Inquiry reporting only; no purge, archive or restore.

**Restore** Restore from the archive file to the file specified in the definition.

### Report Level

A 1- to 6-character field to specify the level of User Report to be generated. For more information on reporting capabilities, refer to Chapter 6, "Report Descriptions".

**Status** Status level report only.

**Detail** Detail level report only (Repository only).

<b>Both</b>	Both status and detail level reports (Repository only).
<b>None</b>	User reports are not generated.

## Selection Criteria

Selection criteria are the conditions you enter to control what data the maintenance process should operate on for the mode in which it is currently running. The selection criteria condition is comprised of fields, operators, and values to form expressions and connectors which join expressions to form the complete condition.

### Field

A 1- to 20-character field to specify the field to be used in the expression. The **F4=Prompt** function key may be used, when the cursor is on this field, to display a selection list of valid selection criteria for the file specified. The valid fields which can be entered vary by the file specified. For a list of valid fields, refer to the "Selection Criteria Reference Chart" below.

### Op

A 2-character field to specify the operator for the expression. For a list of valid operators, refer to the "Selection Criteria Reference Chart" below.

### Value

A 1- to 45-character field to specify the value which should be used to test for a match with the fields data value. For a list of valid values, refer to the "Selection Criteria Reference Chart" below.

### Connector

A 2- or 3-character field to connect multiple expressions for completing the selection criteria desired. Order of precedence is ANDs before ORs (that is, ANDs are evaluated, then ORs are evaluated, then the condition is tested for truth.) For example, A and B or C and D would be evaluated as (A and B) or (C and D).

<b>AND</b>	Both expressions must be true.
<b>OR</b>	One of the expressions must be true.



## Selection Criteria Reference Chart

### Purpose

The Selection Criteria Reference Chart provides you with a quick reference to the fields and their valid values that may be used in a maintenance or inquiry process.

### Structure

**Charts** The Selection Criteria Reference Charts are organized as follows:

File	Class
Repository	Exceptions
Repository	Tracking
Profile	Exceptions
Profile	Tracking
Profile	System

**Field** This column is used to specify the field to be used in the expression. The valid fields which can be entered vary by the File and Class specified.

**Operator** This column is used to specify the operators to be used for the expression.

<b>EQ</b>	Equal
<b>NE</b>	Not Equal
<b>GT</b>	Greater Than
<b>LT</b>	Less Than
<b>LE</b>	Less Than or Equal To
<b>GE</b>	Greater Than or Equal To
<b>any</b>	Any of the operators above can be specified.

**Value** This column specifies the value which should be used to compare against the field's data value.

### Using the Selection Criteria Reference Chart

1. Locate the Selection Criteria Reference Chart based on the file and class for the maintenance/inquiry process.
2. Locate the desired field on the "Selection Criteria Reference Chart".
3. Refer to the VALUE column for valid entries for the desired field.

## Selection Criteria Reference Chart – Repository File

**Note:** \*- Indicates criteria for Sterling Connect exceptions.  
 \*\*- Indicates criteria for Sterling Gentran:Realtime exceptions.

Repository File / Exceptions		
Field	Operator	Value
Action Performed	any	Name of the Exception Action performed for the exception. 1- to 10-character value
Added Flag*	EQ, NE	Indicates whether the batch has been added offline. Y – Yes
Age Closed	any	The number of days the exception has been closed. nnn (000-999)
Age Open	any	The number of days the exception has been open. nnn (000-999)
Age Reviewed	any	The number of days the exception has been in review. nnn (000-999)
Age Transferred	any	The number of days the exception has been transferred. nnn (000-999)
Application Data ID	any	Application Data ID that was used to process the exception. 1- to 10-character value
Batch ID*	any	The user assigned ID for the batch. 1- to 24-character value
Batch Number*	any	The current batch number assigned by Sterling Connect. 7-digit value
CICS Task Number**	any	The CICS task number which processed the exception. 7-digit value
CICS Transaction ID**	EQ, NE	The CICS Transaction ID which processed the exception. 4-character value
Collected Flag*	EQ, NE	Indicates whether the batch has been collected online. Y – Yes
Comm Protocol*	EQ, NE	Indicates whether the batch originates from BSC, SNA, or Host. <ul style="list-style-type: none"> <li>• B – BSC</li> <li>• H – Host</li> <li>• S – SNA</li> </ul>
Databank System Ind	EQ, NE	Indicates the Databank System for the exception. <ul style="list-style-type: none"> <li>• G or Sterling Gentran</li> <li>• R or Sterling Gentran:Realtime</li> </ul>

Repository File / Exceptions		
Field	Operator	Value
Deferred Enveloping	EQ, NE	The item is a deferred enveloping item. <ul style="list-style-type: none"> <li>• Y – Yes, is a deferred enveloping item.</li> <li>• N – No, is not a deferred enveloping item.</li> </ul>
Direction	EQ, NE	Direction the exception was travelling. <ul style="list-style-type: none"> <li>• I – Inbound (from partner)</li> <li>• O – Outbound (to partner)</li> </ul>
Division	any	Controls what data a User ID can access. 1- to 3-character value
Exception Status	any	The Current Status for the exception. <ul style="list-style-type: none"> <li>• C or Closed</li> <li>• O or Open</li> <li>• R or Review</li> <li>• T or Transfer</li> </ul>
Extracted Flag*	EQ, NE	Indicates whether the batch has been extracted. Y – Yes
Failure Code*	any	The Sterling Connect failure code associated with the batch. 3-digit code
Group Env Ref ID	any	Functional Group Envelope Reference ID. <ul style="list-style-type: none"> <li>• 1- to 14-character value (EDIFACT/TRADACOMS)</li> <li>• 1- to 9-digit number (X12 and TDCC) leading zeros required</li> </ul>
Incomplete Flag*	EQ, NE	Indicates whether the batch is incomplete. <ul style="list-style-type: none"> <li>• Y – Yes</li> <li>• N – No</li> </ul>
Int Env Ref ID	any	Interchange Envelope Reference ID <ul style="list-style-type: none"> <li>• 1- to 14-character value (EDIFACT/TRADACOMS)</li> <li>• 1- to 9-digit number (X12 and TDCC) leading zeros required</li> </ul>
Network	any	Network ID from the Trading Profile that processed this exception. 1- to 15-character value
Online Deletes	EQ	Used to control how exceptions <b>marked</b> for deletion from the Online Facility should be handled. <ul style="list-style-type: none"> <li>• NO – Select all exceptions <b>not</b> marked for deletion.</li> <li>• YES – Select all marked exceptions and exceptions which match any other specified selection criteria.</li> </ul>

Repository File / Exceptions		
Field	Operator	Value
Online Delete Recept	EQ	Used to control how recipients <b>marked</b> for deletion from the Online Facility should be handled. <ul style="list-style-type: none"> <li>• NO – Select all recipients <b>not</b> marked for deletion.</li> <li>• YES – Select all marked recipients.</li> </ul> <b>Note:</b> This criteria will not be used with other selection criteria to select a recipient, therefore, the Connectors must be OR.
Option**	any	The Sterling Gentrans:Realtime Option Number which processed the exception. 3-digit value
Partner	any	Partner ID from the Trading Profile that processed this exception. <ul style="list-style-type: none"> <li>• 1- to 15-character value (If Trading Profile mode is Relationship.)</li> <li>• 1- to 35-character value (If Trading Profile mode is Partner-Qualifier.)</li> </ul>
Partner Qual	any	Partner Qualifier for the Partner. (Only valid if Trading Profile mode is Partner-Qualifier.) 1- to 4-character value
Path ID**	any	The Sterling Gentrans:Realtime Path ID which processed the exception. 3-digit value
Process	any	Tracking Point Process by which the exception was processed. 1- to 8-character value
Queue File Number**	any	The Queue File Number which contained the output data for the exception. 3-digit value
Recipient Name	any	The name of the recipient to which the exception belongs. 1- to 10-character value
Record Count*	any	The number of records for the batch. 9-digit code
Remote ID*	any	The remote ID associated to the batch. 8-character value
Requestable Flag*	EQ, NE	Indicates whether the batch is available for request. <ul style="list-style-type: none"> <li>• Y – Yes</li> <li>• N – No</li> </ul>
Set	any	The EDI Transaction Set ID 1- to 6-character value

Repository File / Exceptions		
Field	Operator	Value
Status Date	any	The date the exception's current status was assigned. MM/DD/YYYY
Status Time	any	The time the exception's current status was assigned. HH:MM
System	any	The Tracking Point System name that the exception was processed by. 1- to 10-character value
Trans Env Ref ID	any	Transaction Set Envelope Reference ID. <ul style="list-style-type: none"> <li>• 1- to 14-character value (EDIFACT/TRADACOMS)</li> <li>• 1- to 9-digit number (X12 and TDCC) leading zeros required</li> </ul>
Transmitted Flag*	EQ, NE	Indicates whether the batch has been transmitted. <ul style="list-style-type: none"> <li>• Y – Yes</li> <li>• N – No</li> </ul>
User	any	The User ID from the Trading Profile that processed this exception. (Only valid if Trading Profile mode is Relationship.) 1- to 15-character value
User Initials	any	The Sterling Gentran User ID initials used to perform the last update for the exception. 1- to 3-character value
User Reference	any	<b>For EDI exceptions</b> , this is the Envelope Reference ID. <b>For application exceptions</b> , this is the User Reference defined in mapping. 1- to 45-character value

**Selection Criteria Reference Chart – Repository File**

**Note:** \*- Indicates criteria for Sterling Connect items.  
 \*\*- Indicates criteria for Sterling Gentran:Realtime items.

Repository File / Tracking		
Field	Operators	Value
Ack Status	any	The acknowledgement status for the item. <ul style="list-style-type: none"> <li>• A – Accepted</li> <li>• E – Accepted with Errors</li> <li>• I – Indeterminate</li> <li>• O – Overdue</li> <li>• P – Partial</li> <li>• R – Rejected</li> <li>• W – Waiting</li> </ul>

Repository File / Tracking		
Field	Operators	Value
Added Flag*	EQ, NE	Indicates whether the batch has been added offline. Y – Yes
Age Tracking	any	The number of days that the item has been tracked. nnn (000-999)
Application Data ID	any	Application Data Id that was used to process the exception. 1- to 10-character value
Batch ID*	any	The user assigned ID for the batch. 1- to 24-character value
Batch Number*	any	The current batch number assigned by Sterling Connect. 7-character value
CICS Task Number**	any	The CICS task number which processed the item. 7-digit value
CICS Transaction ID**	EQ, NE	The CICS Transaction ID which processed the item. 4-character value
Collected Flag*	EQ, NE	Indicates whether the batch has been collected online. Y – Yes
Comm Protocol*	EQ, NE	Indicates whether the batch originates from BSC, SNA, or Host. <ul style="list-style-type: none"> <li>• B – BSC</li> <li>• H – Host</li> <li>• S – SNA</li> </ul>
Compliance Status	any	The compliance status for the item. <ul style="list-style-type: none"> <li>• 00 – No errors were encountered.</li> <li>• 04 – One or more errors encountered.</li> <li>• 08 – One or more missing or misplaced segments were encountered.</li> <li>• 12 – The transaction set was incomplete.</li> </ul>
Databank System Ind	EQ, NE	Indicates the Databank System for the item. <ul style="list-style-type: none"> <li>• G or Sterling Gentran</li> <li>• R or Sterling Gentran:Realtime</li> </ul>
Deferred Enveloping	EQ, NE	The item is a deferred enveloping item. <ul style="list-style-type: none"> <li>• Y – Yes, is a deferred enveloping item.</li> <li>• N – No, is not a deferred enveloping item.</li> </ul>
Direction	EQ, NE	Direction the exception was travelling. <ul style="list-style-type: none"> <li>• I – Inbound (from partner)</li> <li>• O – Outbound (to partner)</li> </ul>
Division	any	Controls what data a User ID can access. 1- to 3-character value

Repository File / Tracking		
Field	Operators	Value
Duplicate Indicator	EQ, NE	The item is a duplicate of another item on the Databank. <ul style="list-style-type: none"> <li>• Y – Yes, is a duplicate.</li> <li>• N – No, is not a duplicate.</li> </ul>
Envelope Status	any	The envelope status for the item. <ul style="list-style-type: none"> <li>• 00 – No errors were encountered</li> <li>• 04 – One or more errors (other than authorization and sequence errors) were encountered in processing the Transmission Envelope, or one or more errors (other than unknown user or unknown partner) were encountered processing the Functional Group envelope.</li> <li>• 08 – Either no Partner ID/Qualifier or User/partner was found corresponding to the sender/receiver codes contained in the Functional Group, or the segment count contained in the Transaction Set Trailer was found to be in error.</li> </ul>
Extracted Flag*	EQ, NE	Indicates whether the batch has been extracted. Y – Yes
Failure Code*	any	The Sterling Connect Failure Code associated with the batch. 3-digit code
Functional Group ID	any	Functional Group ID for the item. 1- to 6-character value
Incomplete Flag*	EQ, NE	Indicates whether the batch is incomplete. <ul style="list-style-type: none"> <li>• Y – Yes</li> <li>• N – No</li> </ul>
Item Type	any	The item type. <ul style="list-style-type: none"> <li>• Batch (for Sterling Gentran:Plus users only)</li> <li>• Document</li> <li>• Functional Group</li> <li>• Interchange</li> <li>• Transaction</li> <li>• U:[type] – User Item type (1- to 16-character value)</li> </ul>
Mapping Status	any	The mapping status for the item. <ul style="list-style-type: none"> <li>• 00 -No errors were encountered during the mapping process for the document.</li> <li>• 04 -One or more non-fatal mapping errors encountered.</li> <li>• 12 -An outbound document could not be translated.</li> </ul>
Network	any	Network ID from the Trading Profile that processed this exception. 1- to 15-character value

Repository File / Tracking		
Field	Operators	Value
Network Status	any	Network Status for this item. <ul style="list-style-type: none"> <li>• E – Error on receive, sorting, or pickup.</li> <li>• N – Network Tracking not active.</li> <li>• P – Picked up.</li> <li>• R – Received.</li> <li>• S – Sorted.</li> <li>• U – Manual network complete.</li> <li>• W – Waiting.</li> </ul>
Option**	any	The Sterling Gentran:Realtime Option Number which processed the item. 3-digit value
Partner	any	Partner ID from the Trading Profile that processed this exception. <ul style="list-style-type: none"> <li>• 1- to 15-character value</li> <li>• (if Trading Profile mode is Relationship.)</li> <li>• 1- to 35-character value</li> <li>• (if Trading Profile mode is Partner-Qualifier.)</li> </ul>
Partner Qual	any	Partner Qualifier for the Partner. (Only valid if Trading Profile mode is Partner-Qualifier.) 1- to 4-character value
Path ID**	any	The Sterling Gentran:Realtime Path ID which processed the item. 3-digit value
Process	any	Tracking Point Process that the exception was processed by. 1- to 8-character value
Process Status 1	any	The process status passed to Sterling Gentran:Viewpoint, for an item, by a User tracking point. 1- to 10-character value
Process Status 2	any	The process status passed to Sterling Gentran:Viewpoint, for an item, by a User tracking point. 1- to 10-character value
Process Status 3	any	The process status passed to Sterling Gentran:Viewpoint, for an item, by a User tracking point. 1- to 10-character value
Processed Date	any	The date the item was processed by the tracking point. MM/DD/YYYY
Processed Time	any	The time the item was processed by the tracking point. HH:MM
Queue File Number+	any	The Queue File Number which processed the item. 3-digit value



Repository File / Tracking		
Field	Operators	Value
Record Count*	any	The number of records for the batch. 9-digit code
Remote ID*	any	The Remote ID associated to the batch. 8-character value
Requestable Flag*	EQ, NE	Indicates whether the batch is available for request. <ul style="list-style-type: none"> <li>• Y – Yes</li> <li>• N – No</li> </ul>
Sequence Status	any	The status from Sequence Checking for the item. <ul style="list-style-type: none"> <li>• 00 – No errors.</li> <li>• 04 – Sequence errors detected.</li> </ul>
Set	any	The EDI Transaction Set ID. 1- to 6-character value
System	any	The Tracking Point System name by which the exception was processed. 1- to 10-character value
Test/Production	any	The test/production indicator for the item. <ul style="list-style-type: none"> <li>• P – Production</li> <li>• T – Test</li> </ul>
Trace ID	any	The Trace ID for the item. 10-character value (aannnnnnnn)
Transmitted Flag*	EQ, NE	Indicates whether the batch has been transmitted. <ul style="list-style-type: none"> <li>• Y – Yes</li> <li>• N – No</li> </ul>
User	any	The User ID, from the Trading Profile, that processed this exception. (Only valid if Trading Profile mode is Relationship.) 1- to 15-character value
User Field 1	any	The User field passed to Sterling Gentran:Viewpoint, for an item, by a User tracking point. 1- to 15-character value
User Field 2	any	The User field passed to Sterling Gentran:Viewpoint, for an item, by a User tracking point. 1- to 15-character value
User Field 3	any	The User field passed to Sterling Gentran:Viewpoint, for an item, by a User tracking point. 1- to 15-character value
User Reference	any	For EDI exceptions, this is the Envelope Reference ID. For application exceptions, this is the User Reference defined in mapping. 1- to 45-character value

## Selection Criteria Reference Chart – Profile File

Profile File / Exceptions		
Field	Operators	Value
Exception Action	any <sup>1</sup>	The Exception Action Definition name. <ul style="list-style-type: none"> <li>• ALL</li> <li>• 1- to 10-character value</li> </ul>
Exception Capture	any <sup>1</sup>	The Exception Capture Definition ID. <ul style="list-style-type: none"> <li>• ALL</li> <li>• 1- to 10-character value</li> </ul>
Exception Profile	any <sup>1</sup>	The Exception Profile Definition name. <ul style="list-style-type: none"> <li>• ALL</li> <li>• 1- to 10-character value</li> </ul>
Online Deletes	EQ	Used to control how exceptions <b>marked</b> for deletion from the Online Facility should be handled. <ul style="list-style-type: none"> <li>• NO – Select all exception definitions <b>not</b> marked for deletion.</li> <li>• YES – Select all marked exceptions and exceptions which match any other specified selection criteria.</li> </ul>
User Message	any <sup>1</sup>	The User Message ID. <ul style="list-style-type: none"> <li>• ALL</li> <li>• U#####</li> </ul>
User Procedure	any <sup>1</sup>	The User Procedure name. <ul style="list-style-type: none"> <li>• ALL</li> <li>• 1- to 10-character value</li> </ul>

<sup>1</sup> Operator must be EQ when ALL is specified in the field value

## Selection Criteria Reference Chart – Profile File

Profile File / Tracking		
Field	Operators	Value
Online Deletes	EQ	Used to control how Tracking definitions <b>marked</b> for deletion from the Online Facility should be handled. <ul style="list-style-type: none"> <li>• NO -Select all Tracking definitions <b>not</b> marked for deletion.</li> <li>• YES – Select all marked definitions and definitions which match any other specified selection criteria.</li> </ul>
Query ID	any <sup>1</sup>	The Query ID. <ul style="list-style-type: none"> <li>• ALL</li> <li>• 1- to 10-character value</li> </ul>

<sup>1</sup> Operator must be EQ when ALL is specified in the field value

## Selection Criteria Reference Chart – Profile File

Profile File / System		
Field	Operators	Value
Maintenance Options	any	The Maintenance/Inquiry Options Definition name. 1- to 10-character value
Online Deletes	EQ	Used to control how System definitions <b>marked</b> for deletion from the Online Facility should be handled. <ul style="list-style-type: none"> <li>• NO – Select all System definitions <b>not</b> marked for deletion.</li> <li>• YES – Select all marked definitions and definitions which match any other specified selection criteria.</li> </ul>
Tracking Point	any <sup>1</sup>	The system and process names of the Sterling tracking point. They must be separated by a comma. <ul style="list-style-type: none"> <li>• ALL</li> <li>• 1- to 10-character, 1- to 8-character</li> <li>• (for example: system, process)</li> </ul>
User Tracking Point	any <sup>1</sup>	The system and process names of the user tracking point. They must be separated by a comma. <ul style="list-style-type: none"> <li>• ALL</li> <li>• 1- to 10-character, 1- to 8-character</li> <li>• (for example: system, process)</li> </ul>

<sup>1</sup> Operator must be **EQ** when ALL is specified in the field value.

## EDIM610 – User Tracking Point Directory Screen

### Purpose

The User Tracking Point Directory is available **ONLY** with the Tracking Management Module. This screen is not accessible from the Extended System Management Menu if Sterling Gentran:Viewpoint Tracking Management is not installed.

The User Tracking Point Directory allows you to list all User Tracking Points that have been defined to Sterling Gentran:Viewpoint. Defining a system/process (for example, PURCHASING/ALL) to Sterling Gentran:Viewpoint as a user tracking point allows that system/process access to the Sterling Gentran:Viewpoint User Gateways for Tracking Management.

The typical user of these functions is your Sterling Gentran:Viewpoint Administrator or EDI Coordinator.

```
EDIM610 9.2.6_____ USER TRACKING POINT DIRECTORY                06/01/2011
Type Action, press Enter.
 1=Add 4=Delete 5=Select 6=Enable 7=Disable

System  @COMMIB___
Process  VPIBCOMM
Status   _ (E=Enabled, D=Disabled)

A System      Process  Description                               Status
- @COMMIB     VPIBCOMM  SAMPLE INBOUND COMMUNICATIONS APPLICATION  E
- @COMMOB     VPOBCOMM  SAMPLE OUTBOUND COMMUNICATIONS APPLICATION  E
- @INVSYSM    VPIBAPPL  SAMPLE INBOUND INVOICE APPLICATION         E
- @POSYSTEM   VPOBAPPL  SAMPLE OUTBOUND PURCHASE ORDER APPLICATION  E
-
-
-
-
-
-
-
-
-

LAST ENTRY DISPLAYED
F1=Help  F3=Exit  F7=Bkwd  F8=Fwd   F12=Cancel
```

### Actions

**1=Add** Enter **1** on any line in the display list and press **Enter** to add a new User Tracking Point Definition. The User Tracking Point Definition screen is displayed with all entry fields blank.

**4=Delete** Enter **4** on the line of the entry to be deleted and press **Enter** to mark a User Tracking Point Definition for deletion. The entry will be marked for deletion, and will be deleted the next time Sterling Gentran:Viewpoint Profiles Maintenance runs.

A User Tracking Point Definition can be restored from the archive file, after maintenance has deleted it from the file. For detailed information on Profiles Maintenance, refer to “File Maintenance Procedures” in Chapter 2, “Operational Procedures”.

**Note:** A user tracking point that has been marked for deletion will display the description “ENTRY HAS BEEN

MARKED FOR DELETION” and may not be updated using the Online Facility.

- 5=Select** Enter **5** on the line of the User Tracking Point to be selected and press **Enter**. The User Tracking Point Definition screen, for the user tracking point selected, is displayed.
- This selected user tracking point screen may be used to either add a new user tracking point or to update the user tracking point displayed.
- 6=Enable** Enter **6** on the line of the User Tracking Point to be enabled, and press **Enter**. When a User Tracking Point is enabled, the Sterling Gentran:Viewpoint Gateways *will* accept calls from that user tracking point (that is, the tracking point will be monitored).
- 7=Disable** Enter **7** on the line of the User Tracking Point to be disabled and press **Enter**. When a User Tracking Point is disabled, the Sterling Gentran:Viewpoint Gateways will *not* accept calls from this tracking point (that is, the user tracking point will not be monitored).

### Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field-level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time. No update is performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the next four fields is entered by the user:

#### System

A 1- to 10-character field. Control the entry, displayed at the top of the list, by entering the User Tracking Point SYSTEM required. Partial names may be entered.

#### Process

A 1- to 8-character field. Control the entry, displayed at the top of the list, by entering the User Tracking Point PROCESS required. Partial names may be entered.

#### Status

A 1-character field that limits the list to a single status.

**blank** Both statuses are listed.

**E** Enabled. Only enabled tracking points are listed.

**D** Disabled. Only disabled tracking points are listed.

**A (Action)**

A 1-character field to request an action for a tracking point. Refer to **Actions** above for details regarding the available actions for this screen.

**System**

The system name of the user tracking point is displayed in this column.

**Process**

The user tracking point process name is displayed in this column.

**Description**

A description of the user tracking point is displayed in this column.

**Note:** A user tracking point that has been marked for deletion will display the description “ENTRY HAS BEEN MARKED FOR DELETION”.

**Status**

The current status for the user tracking point is displayed in this column.

## EDIM611 – User Tracking Point Definition Screen

### Purpose

The User Tracking Point Definition is available **ONLY** with the Tracking Management Module. This screen is not accessible from the Extended System Management Menu if Sterling Gentran:Viewpoint Tracking Management is not installed.

The User Tracking Point Definition allows you to define a User Tracking Point with the options you need for that process. The User Tracking Point Definition screen provides the definition of a User Tracking Point to the Sterling Gentran:Viewpoint system.

You may define a User Tracking Point as a general system (for example, System – Purchasing, Process – ALL), or define a User Tracking Point as a specific process within a system (for example, System – PURCHASING, Process – PURC1234).

**Note:** Process-specific User Tracking Point definitions override general User Tracking Point Definitions.

```

EDIM611 9.2.7_____ USER TRACKING POINT DEFINITION 06/01/2011
Type Action, press Enter.
_ 1=Add 2=Update 4=Delete

System . . . . . @INVSYSM
Process . . . . . VPIBAPPL
Description . . . . . SAMPLE INBOUND INVOICE APPLICATION_____
Item Type . . . . . U:INVOICE_____ (F4=Prompt)
Status . . . . . E (E=Enabled, D=Disabled)

Process Status Names                                User Field Names
Status 1 Name  U:PGM. STATUS__                      Field 1 Name  U:P.O. NUMBER__
Status 2 Name  U:PYMT. STATUS_                      Field 2 Name  U:INVOICE DATE_
Status 3 Name  U:RCV'D. STATUS                      Field 3 Name  U:SHIP DATE____

F1=Help  F3=Exit  F4=Prompt  F12=Cancel

```

### Actions

**1=Add** Enter **1** and press **Enter** to add a new User Tracking Point Definition to Sterling Gentran:Viewpoint. If the tracking point already exists, an error message is displayed and the tracking point is not added.

**2=Update** Enter **2** and press **Enter** to update a User tracking point definition. The tracking point definition will be updated in Sterling Gentran:Viewpoint, using the current field values.

When the action is complete, the screen will redisplay with a message indicating that the Tracking Point Definition has been updated. If the entry does not exist, the screen will redisplay with a message indicating that the Tracking Point Definition was not found.

**4=Delete** Enter **4** and press **Enter** to mark a User tracking point definition for deletion. The tracking point will be marked for deletion and will be deleted during the next run of Profiles Maintenance.

A tracking point definition can be restored from the archive file after maintenance has deleted it from the file. Refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures" for information on Profiles Maintenance.

**Note:** A User tracking point that has been marked for deletion may not be updated from the Online Facility.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F4=Prompt** Displays a selection list of values available for the field on which the cursor is currently located. The prompt function is only available on fields marked with **F4=Prompt**.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the following fields is entered by the user:

### (Action)

A 1-character field to request an action for the User tracking point. Refer to **Actions** above for details regarding the available actions for this screen.

### System

A 1- to 10-character field used in conjunction with Process to specify the User tracking point.

### Process

A 1- to 8-character field used in conjunction with System to specify the User tracking point.

### Description

A 1- to 45-character field to describe the User tracking point.

### Item Type

A 1- to 16-character field you **must** enter. You must enter "U:" as the first 2 characters for the Item Type. To list all User Item Types that have been defined, use the **F4=Prompt** function key in the Item Type field. Item Type is a mandatory field in the Query Request search function.



The Item Type is used to classify similar business data and documents into a single group.

**For example:**

Your purchasing system may process many different documents, or may have many processes that affect the same document. In this case, you may name the item type "PURCHASING". However, other applications may have a single type of document or process and, in this case, you may name the item type as the document or process name.

**Status**

A 1-character field to enable or disable the User tracking point.

- E** Enabled. While a user tracking point is enabled, Sterling Gentran:Viewpoint User Gateways *will* accept calls from the user tracking point (that is, the user tracking point will be monitored).
- D** Disabled. While a user tracking point is disabled, Sterling Gentran:Viewpoint User Gateways will *not* accept calls from the user tracking point (that is, the user tracking point will not be monitored).

**Process Status Names**

A 1- to 15-character field. User processes that are monitored by Sterling Gentran:Viewpoint, may attach 1 to 3 statuses to each item. The names that are entered here are used as the labels for the process status fields on the Item Process Detail screen. The first 2 characters of the status name must be "U:". A process status value passed to Sterling Gentran:Viewpoint is a 1- to 10-character field.

- Process Status Name 1** U:.....
- Process Status Name 2** U:.....
- Process Status Name 3** U:.....

**User Field Names**

A 1- to 15-character field entered by the user. User processes that are monitored by Sterling Gentran:Viewpoint, may attach 1 to 3 user fields to each item that they pass to the Tracking Management module. The names that are entered here are used as the labels for the User fields on the Item Process Detail screen. The first 2 characters of the status name must be "U:". A user field value passed to Sterling Gentran:Viewpoint is a 1- to 15-character field.

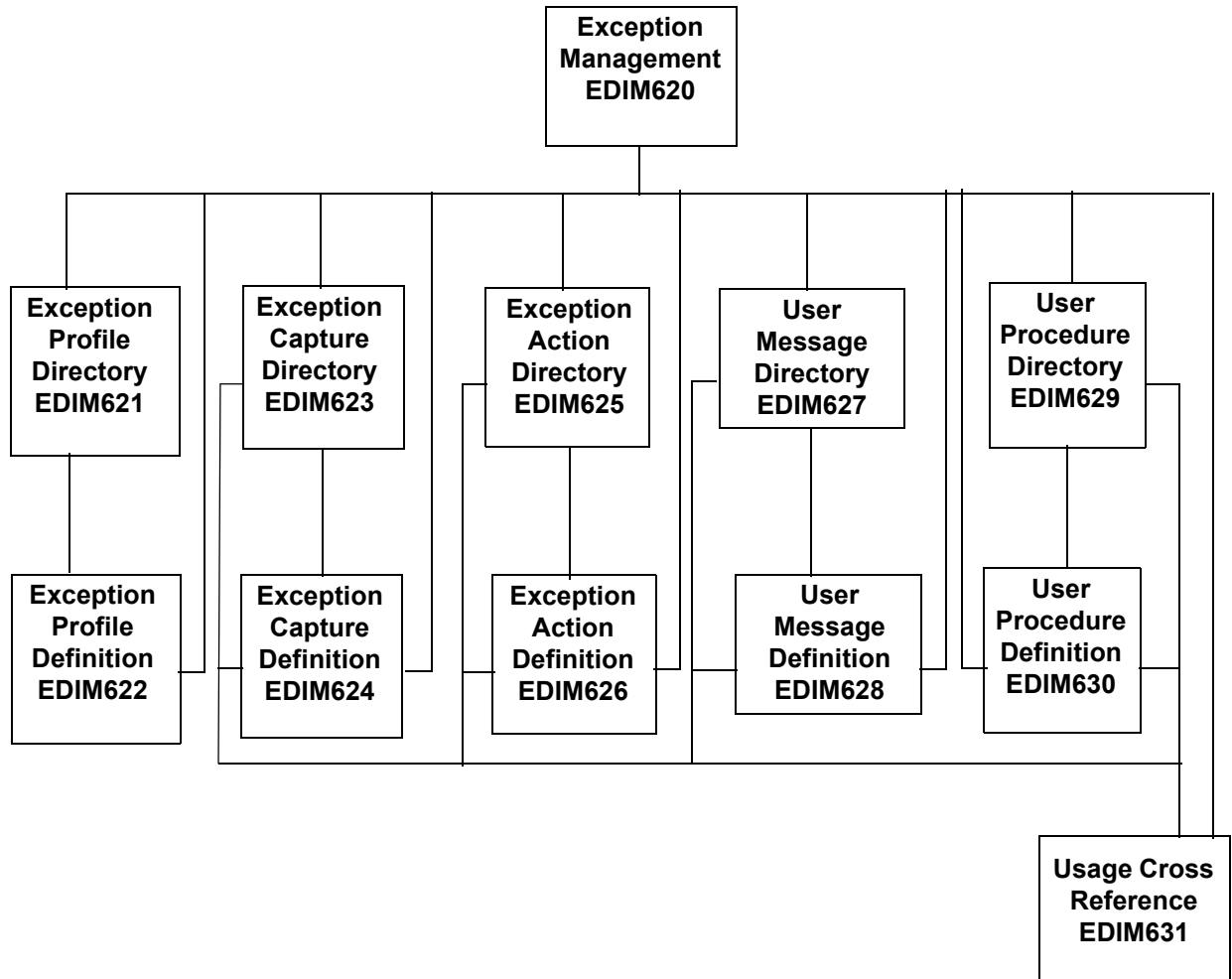
- User Field Name 1** U:.....
- User Field Name 2** U:.....
- User Field Name 3** U:.....

## Exception Management Screens

### Exception Management Navigation

This section contains detailed information on the Exception Management Screens. The fields maintained in Exception Management and the effect they have on your system are explained.

The navigation for Exception Management is illustrated in Figure 5.3.



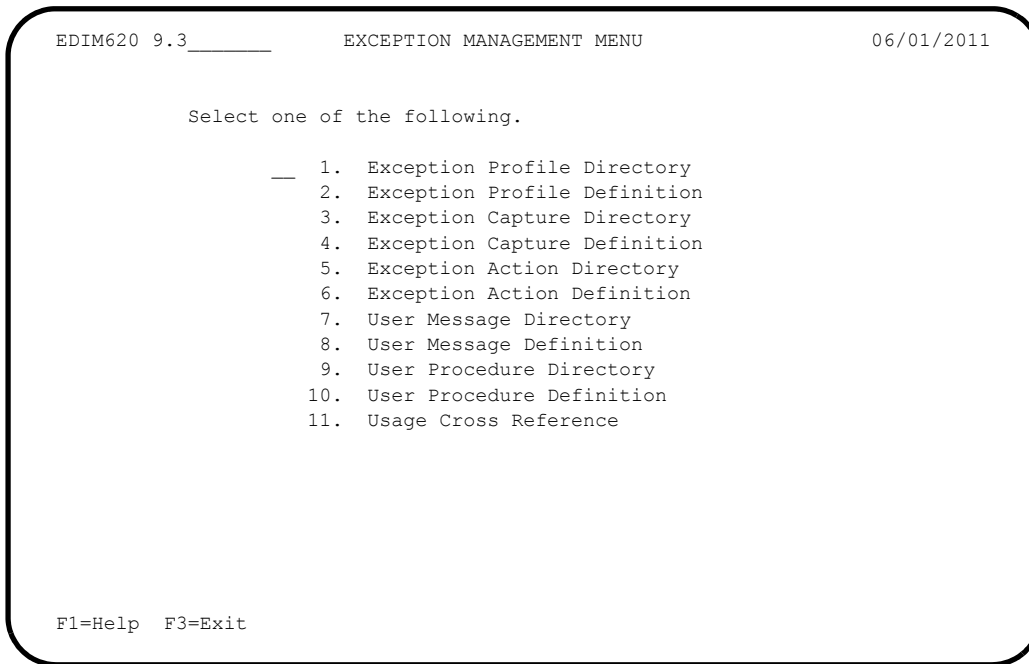
**Figure 5.3 Exception Management Navigation**

## EDIM620 – Exception Management Menu

### Purpose

The Exception Management Menu provides direct access to the primary functions of Exception Management. Exception Management functions allow you to set up and control the Sterling Gentran:Viewpoint Exception Profiles and Definitions.

Exception Management options are typically used by the Sterling Gentran:Viewpoint Administrator or the EDI Coordinator in response to an end user request. However, end users may be granted authorization to use these options.



The Exception Management Menu contains eleven options. The list of menu options, as well as a brief description of each option, is listed below.

Menu Option	Description
1. Exception Profile Directory	Provides a list of Exception Profiles which are defined to Sterling Gentran:Viewpoint.
2. Exception Profile Definition	Provides you with the ability to define criteria for controlling how an exception should be handled.
3. Exception Capture Directory	Provides a list of Exception Capture Definitions which are defined to Sterling Gentran:Viewpoint.

Menu Option	Description
4. Exception Capture Definition	Allows you to define an event as an exception to be captured by Sterling Gentran:Viewpoint. From the Exception Capture Definition screen, you may attach user messages and user procedures to the exception. These messages and procedures may be used while resolving the exception.
5. Exception Action Directory	Provides a list of Exception Action Definitions which are defined to Sterling Gentran:Viewpoint.
6. Exception Action Definition	Allows you to define automated user systems/functions (for example, pager system, E-MAIL) you wish to use for responding to exceptions which are captured. Sterling Gentran:Viewpoint will initiate these actions based on trigger levels that are defined in the Exception Profile.
7. User Message Directory	Provides a list of the user messages which have been defined to Sterling Gentran:Viewpoint.
8. User Message Definition	Allows you to define messages and explanations which are meaningful to your specific needs. User messages and explanations are available from Exception Inquiry when you are resolving exceptions.
9. User Procedure Directory	Provides a list of the user procedures which have been defined to Sterling Gentran:Viewpoint.
10. User Procedure Definition	Allows you to define manual actions and procedures. The user procedures may then be attached to Exception Profiles for online use by users when they are resolving an exception.
11. Usage Cross Reference	Allows you to determine the use of Captures, Recipients, Actions, User Messages, User Procedures, Batch Actions, and Online Actions.

## EDIM621 – Exception Profile Directory Screen

### Purpose

The Exception Profile Directory allows you to list all Exception Profiles that have been created. Exception Profiles combine capture, recipient, and action information to control how an exception should be handled by Sterling Gentran:Viewpoint.

This function is typically used by your Sterling Gentran:Viewpoint Administrator or the EDI Coordinator in response to an end-user request. However, end-users may be granted authorization to set up their own Exception Profiles.

```

EDIM621 9.3.1 _____ EXCEPTION PROFILE DIRECTORY 06/01/2011
Type Action, press Enter
  1=Add  4=Delete  5=Select  6=Enable  7=Disable

Profile @MODEL-AR_
Status  _ (E=Enabled, D=Disabled)

A Profile      Description                                     Status
- @MODEL-AR    ACKNOWLEDGEMENT ERRORS                          E
- @MODEL-CM    COMMUNICATIONS ERRORS                                      E
- @MODEL-CMI   COMMUNICATIONS ERRORS (CONNECT INBOUND API)              E
- @MODEL-CMO   COMMUNICATIONS ERRORS (CONNECT OUTBOUND API)             E
- @MODEL-DS    ALL DOCUMENT SUSPENSE ERRORS                             E
- @MODEL-GS    ALL GROUP SUSPENSE ERRORS                                E
- @MODEL-IE    INBOUND COMPLIANCE ERRORS                                E
- @MODEL-IM    INBOUND MAPPING ERRORS                                   E
- @MODEL-IS    ALL INTERCHANGE SUSPENSE ERRORS                          E
- @MODEL-OE    OUTBOUND COMPLIANCE ERRORS                               E
- @MODEL-OEX   OUTBOUND EDI EXTRACT ERRORS                              E
- @MODEL-OM    OUTBOUND MAPPING ERRORS                                  E
- @MODEL-OU    COMMUNICATIONS ERRORS (STOUTL)                           E

F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel
    
```

### Actions

**1=Add** Enter **1** and press **Enter** to display a blank Exception Profile Definition screen.

**4=Delete** Enter **4** on the line of the Exception Profile to be deleted and press **Enter**. The Exception Profile is marked for deletion, and will be deleted during the next run of Profiles Maintenance.

An exception profile definition can be restored from the archive file after maintenance has deleted it from the file. For more information on Profiles Maintenance, refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** An Exception Profile that has been marked for deletion will display the description "ENTRY HAS BEEN MARKED FOR DELETION" and may not be updated from the Online Facility

**5=Select** Enter **5** on the line of the Exception Profile to be selected and press **Enter**. The Exception Profile Definition screen for the Exception Profile selected will be displayed.

**6=Enable** Enter **6** on the line of the Exception Profile to be enabled and press **Enter**. When an Exception Profile is enabled, the Profile is used for monitoring tracking points.

**7=Disable** Enter 7 on the line of the Exception Profile to be disabled and press **Enter**. When an Exception Profile is disabled, the Profile will not be used for monitoring tracking points.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F7=Bkwd** Scroll backward through the list on the current screen.

**F8=Fwd** Scroll forward through the list on the current screen.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the next three fields is entered by the user:

### Profile

A 1- to 10-character field. Control the entry displayed at the top of the list by entering the Exception Profile required. Partial names may be used.

### Status

A 1-character field to limit the list to a single status type.

<b>blank</b>	Both statuses are listed.
<b>E</b>	Enabled. Only enabled exception profiles are listed.
<b>D</b>	Disabled. Only disabled exception profiles are listed.

### A (Action)

A 1-character field to request an action for a profile. Refer to **Actions** above for details regarding the available actions for this screen.

### Profile

The name of the Exception Profile is displayed in this column.

### Description

The description of the Exception Profile is displayed in this column.

**Note:** An exception profile that has been marked for deletion will display the description "ENTRY HAS BEEN MARKED FOR DELETION".

### Status

The current status for the profile is displayed in this column.

## EDIM622 – Exception Profile Definition Screen

### Purpose

An Exception Profile definition allows you to combine your requirements for controlling how an exception should be handled. The Exception Profile defines the rules which should be used for processing events that are passed through to Sterling Gentran:Viewpoint.

The criteria used for defining an Exception Profile are a **capture condition**, a **recipient**, and/or an **action**. Actions for responding to an exception are automatically initiated by the Exception Profile.

```

EDIM622 9.3.2_____ EXCEPTION PROFILE DEFINITION                                06/01/2011
Type Action, press Enter
_ 1=Add 2=Update 4=Delete

Profile . . . . @MODEL-AR_
Description . . ACKNOWLEDGEMENT_ERRORS_____
Status . . . . E (E=Enabled, D=Disabled)

Capture . . . @MODEL-AR_ (F4=Prompt)
Description : CAPTURE ACKNOWLEDGEMENTS NOT ACCEPTED

Recipient . . . @ACKREC___ (F4=Prompt)
Description . . ACKNOWLEDGEMENT_RECONCILIATION_ERRORS_____

CC Recipient . _____ (F4=Prompt)
Description . . _____

Action . . . . @MODEL-BAT (F4=Prompt)
Description : SAMPLE BATCH ACTION
Trigger Level RUN_

F1=Help F3=Exit F4=Prompt F12=Cancel

```

### Actions

- 1=Add** Enter **1** and press **Enter** to add a new Exception Profile Definition. If the profile already exists, an error message is displayed and the profile will not be added.
- 2=Update** Enter **2** and press **Enter** to update an Exception Profile Definition. The Exception Profile Definition is updated using the current screen field values. When the action is complete, the screen redisplay with a message indicating that the Exception Profile Definition has been updated. If the entry does not exist, the screen will redisplay with a message indicating the Exception Profile was not found.
- 4=Delete** Enter **4** and press **Enter** to mark an Exception Profile Definition for deletion. The Exception Profile will be marked for deletion and will be deleted the next time Profiles Maintenance is run. For more information on Profiles Maintenance, refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".
- Note:** An Exception Profile Definition that has been marked for deletion may not be updated from the Online Facility.

## Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F4=Prompt** Displays a selection list of values available for the field, on which the cursor is currently located. The prompt function is only available on fields that are marked with **F4=Prompt**.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the next five fields is entered by the user:

### (Action)

A 1-character field to request an action. Refer to **Actions** above for details regarding the available actions for this screen.

### Profile

A 1- to 10-character field used to identify the name you want associated with the Exception Profile Definition.

### Description

A 1- to 45-character field to describe the Exception Profile.

### Status

A 1-character field used to control whether or not the profile should be used by Sterling Gentran:Viewpoint for evaluating the staging area data.

**E** Enabled. The profile will be used by the post-processor to process staging area data.

**D** Disabled. The profile will not be used to evaluate staging area data.

### Capture

A 1- to 10-character field which identifies the Capture Definition to be used by this Exception Profile.

From this field, **F4=Prompt** may be used to obtain a list of available Exception Capture Definitions.

### Description

The description of the Capture Definition is displayed in this field.



**Recipient**

A 1- to 10-character field used to identify the recipient for exceptions captured by this profile. From this field, **F4=Prompt** may be used to obtain a list of available Recipients.

**Description**

A 1- to 45-character field used to describe the recipient. If the recipient is a new recipient, you may enter a description for that recipient. If the recipient entered is an existing recipient, the description for that recipient is displayed and can be updated.

**CC Recipient**

A 1- to 10-character optional field used to identify the carbon copy recipient for exceptions captured by this profile. From this field **F4=Prompt** may be used to obtain a list of available Recipients.

**Description**

A 1- to 45-character field used to describe the carbon copy recipient. If the recipient is a new recipient, you may enter a description for that recipient. If the recipient entered is an existing recipient, the description for that recipient is displayed and can be updated.

**Action**

A 1- to 10-character optional field used to identify the Exception Action which should be performed for the Exception Profile. From this field **F4=Prompt** may be used to obtain a list of available Exception Action Definitions.

**Description**

The description for the Exception Action Definition is displayed in this field.

**Trigger Level**

A 1- to 4-character field used to control when the action should be performed for exceptions captured by the profile.

<b>RUN</b>	If any exceptions are captured by the profile, initiate the action once when the process has ended.
<b>EXCP</b>	Perform the action once for each exception captured by the profile.

## EDIM623 – Exception Capture Directory Screen

### Purpose

The Exception Capture Directory screen allows you to list all Exception Capture Definitions that have been created.

From this directory you may quickly determine if the capture condition you require has already been defined. If so, simply use this Capture Definition in your Exception Profile.

This function will typically be used by the Sterling Gentran:Viewpoint Administrator or the EDI Coordinator. However, end users may be granted authorization to access this directory.

```

EDIM623 9.3.3_____ EXCEPTION CAPTURE DIRECTORY                                06/01/2011
Type Action, press Enter
  1=Add  4=Delete  5=Select  8=Usage

System . . CONNECT_____
Process   EDIR314_
Capture ID @MODEL-CMO

A System      Process  Capture ID Description
- CONNECT    EDIR314  @MODEL-CMO CONNECT OUTBOUND INTERFACE ERRORS
- CONNECT    EDIR316  @MODEL-CMI CONNECT INBOUND INTERFACE ERRORS
- CONNECT    MAILBOX  @MODEL-CM  CONNECT ERRORS
- CONNECT    STOUTL   @MODEL-OU  CONNECT OFFLINE UTILITIES ERRORS
- GENTRAN    ALL      @MODEL-DS  ALL DOCUMENT SUSPENSE ERRORS
- GENTRAN    ALL      @MODEL-GS  ALL GROUP SUSPENSE ERRORS
- GENTRAN    ALL      @MODEL-IS  ALL INTERCHANGE SUSPENSE ERRORS
- GENTRAN    ALL      @MODEL-TS  ALL TRANSACTION SUSPENSE ERRORS
- GENTRAN    ALL      @MODEL-16  ALL FATAL ERRORS
- GENTRAN    EBDI001  @MODEL-IE  INBOUND COMPLIANCE ERRORS
- GENTRAN    EBDI002  @MODEL-OE  OUTBOUND COMPLIANCE ERRORS
- GENTRAN    EBDI041  @MODEL-IM  INBOUND MAPPING ERRORS

F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel

```

### Actions

**1=Add** Enter **1** on any line in the display list and press **Enter** to add a new Exception Capture Definition. The Exception Capture Definition screen is displayed with all entry fields blank.

**4=Delete** Enter **4** on the line of the entry to be deleted and press **Enter** to mark an Exception Capture Definition for deletion. The Exception Capture Definition is marked for deletion, and will be deleted during the next run of Profiles Maintenance.

For more information on Profiles Maintenance, refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** An Exception Capture Definition that has been marked for deletion will display the description "ENTRY HAS BEEN MARKED FOR DELETION" and may not be updated from the Online Facility.

- 5=Select** Enter **5** on the line of the entry to be selected and press **Enter** to select an existing Exception Capture Definition. The Exception Capture Definition screen for the Exception Capture Definition selected is displayed.
- 8=Usage** Enter **8** on the line of the entry to be selected and press **Enter** to transfer to the Usage Cross Reference screen. The Exception Profiles that use the selected Exception Capture Definition are displayed.

### Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the next four fields is entered by the user:

#### System

A 1- to 10-character field used to control which System is displayed at the top of the list. You may use partial names.

#### Process

A 1- to 8-character field used to control which Process is displayed at the top of the list. You may use partial Processes.

#### Capture ID

A 1- to 10-character field used to control which Capture ID is displayed at the top of the list. You may use partial Capture IDs.

#### A (Action)

A 1-character field to request an action for a Capture Definition. Refer to **Actions** above for details regarding the available actions for this screen.

#### System

The tracking point system name that the capture definition belongs to is displayed in this column.

#### Process

The tracking point process name that the capture definition belongs to is displayed in this column.

**Capture ID**

The capture definition ID is displayed in this column.

**Description**

The capture definition description is displayed in this column.

**Note:** A capture definition that has been marked for deletion will display the description “ENTRY HAS BEEN MARKED FOR DELETION”.

## EDIM624 – Exception Capture Definition Screen

### Purpose

The Exception Capture Definition screen allows you to specify the exact condition of the exception you wish to capture. The conditions for defining an event as an exception may be as specific or general as you choose.

From this screen, you may also attach a User Message and User Procedure to the Capture Definition. The User Message and Procedure will then be available to the end-user in Exception Inquiry to aid in the resolution of the exception. Refer to Chapter 2, "Optional Features" for more details about the use of User Messages and Procedures.

```

EDIM624 9.3.4_____ EXCEPTION CAPTURE DEFINITION                                06/01/2011
Type Action, press Enter
  _ 1=Add 2=Update 4=Delete 8=Usage

System . . . CONNECT_____
Process . . . EDIR314_____
Capture ID @MODEL-CMO_____
Description CONNECT_OUTBOUND_INTERFACE_ERRORS_____

User Message _____ (F4=Prompt)    User Procedure _____ (F4=Prompt)

Item Type    BATCH_____ (F4=Prompt)

Capture Condition (F4=Prompt)
Field        Op  Value                                     Connector
INCOMPLETE_FLAG_____ EQ  Y_____
_____      --  _____
_____      --  _____
_____      --  _____
_____      --  _____
_____      --  _____

F1=Help  F3=Exit  F4=Prompt  F7=Bkwd  F8=Fwd  F12=Cancel

```

### Actions

- 1=Add** Enter **1** and press **Enter** to add a new Exception Capture Definition. The Exception Capture Definition will be added to Sterling Gentran:Viewpoint. If the Exception Capture already exists, an error message is displayed and the Exception Capture will not be added.
- 2=Update** Enter **2** and press **Enter** to update the Exception Capture definition using the current screen field values.
- When the Action is complete, the screen redisplay with a message indicating that the Exception Capture Definition has been updated. If the entry does not exist, the screen redisplay with a message indicating that the Exception Capture Definition was not found.
- 4=Delete** Enter **4** in the Action field, and press **Enter** to mark an Exception Capture Definition for deletion. The Exception Capture is marked for deletion, and will be deleted the next time Profiles Maintenance is run.

For more information on Profiles Maintenance refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** An Exception Capture that has been marked for deletion is displayed but may not be updated. Only definitions not currently in use by an Exception Profile may be deleted.

**8=Usage** Enter **8** and press **Enter** to transfer to the Usage Cross Reference screen. The Exception Profiles that use the Exception Capture Definition are displayed.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F4=Prompt** Displays a selection list of values available for the field, on which the cursor is currently located. The prompt function is only available on fields that are marked with **F4=Prompt**.

**F7=Bkwd** Scroll backward through the Capture Conditions listed on the screen.

**F8=Fwd** Scroll forward through the Capture Conditions listed on the screen.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the following fields is entered by the user:

### (Action)

A 1-character field to request an action for the Capture Definition. Refer to **Actions** above for details regarding the available actions for this screen.

### System

A 1- to 10-character field used in conjunction with Process to identify the tracking point to which this Capture Definition belongs. Refer to the "Capture Condition Reference Chart" which follows.

**GENTRAN** Sterling Gentran:Basic or Sterling Gentran:Realtime System

**CONNECT** Sterling Connect Communications System (for Sterling Gentran:Plus users with Sterling Connect)

**Process**

A 1-to 8-character field used in conjunction with System to identify the tracking point to which this Capture Definition belongs. Refer to the "Capture Condition Reference Chart" which follows.

<b>ALL</b>	All processes for the system will be accepted by the Gateway.
<b>Sterling Gentran Processes</b>	
<b>EDID205</b>	Outbound EDI Databank Extract
<b>EDID405</b>	Inbound Application Databank Extract
<b>EDID510</b>	Acknowledgement Reconciliation/Monitor
<b>EDID850</b>	Network Reconciliation
<b>EBDI001</b>	Inbound Editor
<b>EBDI002</b>	Outbound Editor
<b>EBDI041</b>	Inbound Mapper
<b>EBDI042</b>	Outbound Mapper
<b>EDID255</b>	Sterling Gentran:Realtime Outbound EDI Databank Extract
<b>EDID455</b>	Sterling Gentran:Realtime Inbound Application Databank Extract
<b>EDID515</b>	Sterling Gentran:Realtime Acknowledgement Reconciliation/Monitor
<b>EDIR001</b>	Sterling Gentran:Realtime Inbound Editor
<b>EDIR002</b>	Sterling Gentran:Realtime Outbound Editor
<b>EDIR041</b>	Sterling Gentran:Realtime Inbound Mapper
<b>EDIR042</b>	Sterling Gentran:Realtime Outbound Mapper
<b>Sterling Connect Processes</b>	
<b>STOUTL</b>	Sterling Connect Offline Utilities
<b>MAILBOX</b>	Sterling Connect Communications Product
<b>EDIR314</b>	Sterling Connect Outbound Interface
<b>EDIR316</b>	Sterling Connect Inbound Interface

**Capture ID**

A 1- to 10-character field that identifies the Capture Definition to be used by this Exception Profile.

**Description**

A 1- to 45-character field that describes the Exception Capture Definition.

**User Message**

A 7-character field where the first character is fixed as "U" to identify the message as a user message and the last 6 characters are a number entered by the user to identify the message.

A User Message is defined by Sterling Gentran:Viewpoint users and may be associated with captured exceptions by specifying a user message here.

The user message specified here will be available to users of Exception Inquiry when resolving exceptions. From this field, **F4=Prompt** may be used to obtain a list of available User Messages.

Refer to Chapter 2, "Optional Features" for more information on the use of User Messages.

**User Procedure**

A 1- to 10-character field that may be associated with captured exceptions by specifying a User Procedure here.

User Procedures are created by Sterling Gentran:Viewpoint users to document procedures/steps which should be taken for the exception which has been captured.

By specifying a User Procedure here, the procedure/steps are available to Exception Inquiry users when resolving exceptions. From this field, you may use the **F4=Prompt** to obtain a list of available User Procedures.

**Item Type**

A 1- to 16-character field that specifies the item type to which the capture condition applies. Refer to the "Capture Condition Reference Chart" which follows. From this field, you may use the **F4=Prompt** to obtain a list of available Item Types.

<b>Batch</b>	The item type is a communications batch (for Sterling Gentran:Plus or Sterling Gentran:Realtime users only).
<b>Document</b>	The item type is a document.
<b>Functional Group</b>	The item type is a functional group.
<b>Interchange</b>	The item type is an interchange.
<b>Run</b>	The item type is a run. (Valid only when "Field" is specified as Return-Code or Run-Incomplete.)
<b>Transaction</b>	The item type is a transaction.

**Capture Condition**

The Capture Condition provides you with the ability to define events you are interested in monitoring. A Capture Condition is comprised of fields, operators, and values to form expressions and connectors which join these expressions to form the complete condition. Refer to the "Capture Condition Reference Chart" for valid values that can be used for a Capture Condition expression.



**Field**

A 1- to 25-character field used to specify the field to be used in the expression. The valid fields which can be entered vary by the Process specified. Use the function key **F4=Prompt** when the cursor is on this field to display a selection list of valid selection criteria for the process specified.

**Op**

A 2-character field used to specify the operator for the expression. Valid operators vary by field, as described below.

<b>EQ</b>	Equal.
<b>NE</b>	Not Equal.
<b>GT</b>	Greater Than.
<b>LT</b>	Less Than.
<b>LE</b>	Less Than or Equal To.
<b>GE</b>	Greater Than or Equal To.

**Value**

A 1- to 35-character field that specifies the value which should be used to test against the field's data value. For valid values refer to the "Capture Condition Reference Chart".

**Connector**

A 2- to 3-character field used to connect multiple expressions for completing the desired selection criteria. The order of precedence is ANDs before ORs (that is, ANDs are evaluated, then ORs are evaluated, then the condition is tested for truth).

For example: A and B or C and D would be evaluated as (A and B) or (C and D)

<b>AND</b>	Both expressions must be true.
<b>OR</b>	Either one of the expressions must be true.

### Capture Condition Reference Chart

**Purpose**

The Capture Condition Chart provides you with a quick reference to the fields you may use in a capture condition. The chart also provides the valid values, processes, and types that can be used with the fields.

**Structure**

**Process/Item Type** Process is used in conjunction with Item Type to identify the tracking point to which this Capture Definition belongs. This field also specifies the exception type to which the capture condition applies.

**Field** This column is used to specify the field to be used in the expression. The valid fields which can be entered vary by the Process specified.

**Operators** This column is used to specify the operator for the expression.

**Value** This column specifies the value which should be used to compare against the field's data value.

### How to Use the Capture Condition Reference Chart

1. Locate the desired field on the "Capture Condition Reference Chart".
2. Identify the process used and its valid item types.
3. Refer to the OPERATOR and VALUE columns for valid entries for the desired field.

### Legend

Sterling Gentran Processes		
OM	EBDI042/EDIR042	Outbound Mapper
OE	EBDI002/EDIR002	Outbound Editor
OEX	EDID205/EDID255	Outbound EDI Extract
AR	EDID510/EDID515	Acknowledgement Reconciliation/Monitor
NR	EDID850	Network Reconciliation
IE	EBDI001/EDIR001	Inbound Editor
IM	EBDI041/EDIR041	Inbound Mapper
IAX	EDID405/EDID455	Inbound Application Extract
Sterling Connect Processes		
OU	STOUTL	Sterling Connect Offline Utilities (for Sterling Gentran:Plus users only)
CM	MAILBOX	Sterling Connect (for Sterling Gentran:Plus users only)
CMOI	EDIR314	Sterling Connect Outbound Interface (for Sterling Gentran:Realtime users only)
CMII	EDIR316	Sterling Connect Inbound Interface (for Sterling Gentran:Realtime users only)

### Item Type

Item Type	Description
R	Run
B	Batch (for Sterling Gentran:Plus users only)
D	Document
I	Interchange

Item Type	Description
F	Functional Group
T	Transaction

**Capture Condition Reference Chart**

Process	Item Type	Field	Operators	Value
<b>The following Capture Conditions apply to Sterling Gentran processes</b>				
OEX AR IE IM IAX	I, F, T I, F, T I, F, T D D	Acknowledge- ment Status	EQ,NE	The current acknowledgement status for the item. <ul style="list-style-type: none"> <li>• A – Accepted</li> <li>• E – Accepted with Errors</li> <li>• I – Indeterminate (only valid for AR process)</li> <li>• O – Overdue (only valid for AR process)</li> <li>• P – Partial</li> <li>• R – Rejected</li> <li>• W – Waiting</li> </ul>
OM OE OEX AR IM IAX	D T T T D D	Application Data ID	EQ, NE	Application Data ID that was used to process the item. 1- to 10-character value
IE	T	Compliance Status	any	The current compliance status for the item. <ul style="list-style-type: none"> <li>• 00 – No errors were encountered.</li> <li>• 04 – One or more element errors were encountered.</li> <li>• 08 – One or more missing or misplaced segments were encountered.</li> <li>• 12 – The transaction set was incomplete.</li> </ul>
OE OEX NR AR	I, F, T I, F, T I I, F, T	Deferred Enveloping	EQ, NE	This item is a deferred enveloping item on the Databank. <ul style="list-style-type: none"> <li>• Y – Yes is a deferred enveloping item.</li> <li>• N – No is not a deferred enveloping item.</li> </ul>

Process	Item Type	Field	Operators	Value
OM OE OEX NR AR IE IM IAX	D I, F, T I, F, T I I, F, T I, F, T D D	Duplicate Indicator	EQ, NE	This item is a duplicate of another item on the Databank. <ul style="list-style-type: none"> <li>Y – Yes is a duplicate.</li> <li>N – No is not a duplicate.</li> </ul>
IE IM IAX	I, F, T D D	Envelope Status	any	The status from Envelope Validation for the item. <ul style="list-style-type: none"> <li>00 – No errors were encountered in the document.</li> <li>04 – One or more errors (other than authorization and sequence errors) were encountered in processing the Transmission Envelope, or one or more errors (other than unknown user or unknown partner) were encountered in processing the Functional Group Envelope.</li> <li>08 – Either no Partner ID/Qualifier or User/Partner was found corresponding to the sender/receiver codes contained in the Functional Group, or the segment count contained in the Transaction Set Trailer was found to be in error.</li> </ul>
OE OEX AR IE	F, T F, T F, T F, T	Functional Group ID	EQ, NE	The functional group ID from the EDI data. 1- to 6-character value
OM IM IAX	D D D	Mapping Status	any	The current mapping status for the item. <ul style="list-style-type: none"> <li>00 – No errors were encountered during the mapping process for the document.</li> <li>04 – One or more non-fatal mapping errors were detected.</li> <li>12 – A document could not be translated.</li> </ul>
OE OEX NR AR	I I I I	Network ID	EQ, NE	The network ID, from the trading profile, that was used to process this item. 1- to 15-character value

## EDIM624 – Exception Capture Definition Screen

Process	Item Type	Field	Operators	Value
NR	I	Network Status	EQ, NE	The current network status for the item. <ul style="list-style-type: none"> <li>E – Error on receive, sorting, or pickup.</li> <li>N – Network Tracking not active.</li> <li>P – Picked up.</li> <li>R – Received.</li> <li>S – Sorted.</li> <li>U – Manual network complete.</li> <li>W – Waiting.</li> </ul>
OM OE OEX NR AR IE IM IAX	D I, F, T I, F, T I I, F, T I, F, T D D	Partner	EQ, NE	Partner ID from the Trading Profile, that processed this item. <ul style="list-style-type: none"> <li>1- to 15-character value (If trading profile mode is Relationship.)</li> <li>1- to 35-character value (If trading profile mode is Partner-Qualifier.)</li> </ul>
OM OE OEX NR AR IE IM IAX	D I, F, T I, F, T I I, F, T I, F, T D D	Partner Qualifier	EQ, NE	Partner Qualifier for the Partner. (Only valid if trading profile mode is Partner-Qualifier.) 1- to 4-character value
OM OE OEX NR AR IE IM IAX	D I, F, T I, F, T I I, F, T I, F, T D D	Processed Date/ Time	any	The date and time the item was last processed by a tracking point. MM/DD/YYYY HH:MM
OM OE OEX NR AR IE IM IAX	R R R R R R R R	Return Code	any	The highest return code from the tracking point, that processed the item. 2-digit number <b>Note:</b> No other fields may be used in the capture condition, if this field is specified. The Item Type in the Capture Definition must specify RUN if this field is used.

Process	Item Type	Field	Operators	Value
OM OE OEX NR AR IE IM IAX	R R R R R R R R	Run Incomplete	N/A	This field may be used for issuing notification that a tracking point run has not completed. <b>NO</b> value is specified for this field.  <b>Note:</b> No other fields may be used in the capture condition, if this field is specified. The Item Type in the Capture Definition must specify RUN if this field is used.
IE IM IAX	I, F, T D D	Sequence Status	any	The status from Sequence Checking for the item. <ul style="list-style-type: none"> <li>• 00 – No errors.</li> <li>• 04 – Sequence errors detected.</li> </ul>
OM OE OEX NR AR IE IM IAX	D I, F, T I, F, T I I, F, T I, F, T D D	System Message	any	The System Message ID generated for the item by the tracking point. 6-digit number (leading zeroes required)
OM OE OEX NR AR IE IM IAX	D I, F, T I, F, T I I, F, T I, F, T D D	Test/ Production	EQ, NE	The test/production indicator for the item. <ul style="list-style-type: none"> <li>• P – Production</li> <li>• T – Test</li> </ul>
OE OEX AR IE IM IAX	T T T T D D	Transaction Set	any	The EDI Transaction Set ID. <ul style="list-style-type: none"> <li>• 1- to 6-character value (EDIFACT)</li> <li>• 1- to 6-digit number (X12 and TDCC)</li> </ul>
OM OE OEX NR AR IE IM IAX	D I, F, T I, F, T I I, F, T I, F, T D D	User	EQ, NE	The User ID assigned to the item, from the trading profile, used to process the item. (Only valid if Trading Profile mode is Relationship.) 1- to 15-character value

EDIM624 – Exception Capture Definition Screen

Process	Item Type	Field	Operators	Value
OM IM	D D	User Error Number	any	The User Error Number generated for the item by the tracking point. 6-digit number (leading Zeroes required)
<b>The following additional Capture Conditions apply to Sterling Gentran processes (Sterling Gentran:Realtime users only)</b>				
OM OE OEX AR IE IM IAX	D I, F, T I, F, T I, F, T I, F, T D D	CICS Transaction ID	EQ, NE	The CICS Transaction ID which processed the exception. 4-character value
OM OE OEX AR IE IM IAX	D I, F, T I, F, T I, F, T I, F, T D D	Option	any	The Option number which processed the exception. 3-digit value
OM OE OEX AR IE IM IAX	D I, F, T I, F, T I, F, T I, F, T D D	Path ID	any	The Path ID which processed the exception. 3-digit value
OM OE OEX AR IE IM IAX	D I, F, T I, F, T I, F, T I, F, T D D	Queue File Number	any	The Queue File Number which contained the output data for the exception. 3-digit value
<b>The following Capture Conditions apply to Sterling Connect processes (Sterling Gentran:Plus or Sterling Gentran:Realtime users only)</b>				
OU CMOI	B B	Added Flag	EQ, NE	Indicates whether the batch has been added offline. Y – Yes

Process	Item Type	Field	Operators	Value
OU CM CMOI CMII	B B B B	Batch ID	EQ, NE	The user assigned ID for the batch. 1- to 24-character value
OU CM CMOI CMII	B B B B	Batch Number	any	The current batch number assigned by Sterling Connect. 7-digit value
CM	B	Collected Flag	EQ, NE	Indicates whether the batch has been collected online. Y – Yes
CM	B	Communication Protocol	EQ, NE	Indicates whether the batch originates from BSC, SNA, or Host. <ul style="list-style-type: none"> <li>• B – BSC</li> <li>• S – SNA</li> <li>• H – Host</li> </ul>
OU CMII	B B	Extracted Flag	EQ, NE	Indicates whether the batch has been extracted. Y – Yes
CM	B	Failure Code	any	The failure code associated with the batch. 3-digit code
OU CM CMOI CMII	B B B B	Incomplete Flag	EQ, NE	Indicates whether the batch is incomplete. <ul style="list-style-type: none"> <li>• Y – Yes</li> <li>• N – No</li> </ul>
OU CM	B B	Processed Date/ Time	any	The date and time the item was last processed by a tracking point. MM/DD/YYYY HH:MM
OU CM CMOI CMII	B B B B	Record Count	any	The number of records for the batch. 9-digit value
OU CM CMOI CMII	B B B B	Remote ID	EQ, NE	The remote ID associated to the batch. 8-character value
OU CM CMOI CMII	B B B B	Requestable Flag	EQ, NE	Indicates whether the batch is available for requests. <ul style="list-style-type: none"> <li>• Y – Yes</li> <li>• N – No</li> </ul>



## EDIM624 – Exception Capture Definition Screen

Process	Item Type	Field	Operators	Value
OU	R	Return Code	any	The highest return code from the tracking point, that processed the item. 2-digit number <b>Note:</b> No other fields may be used in the capture condition, if this field is specified. The Item Type in the Capture Definition must specify RUN if this field is to be used.
OU	R	Run Incomplete	N/A	This field may be used for issuing notification that a tracking point run has not completed. <b>NO</b> value is specified for this field. <b>Note:</b> No other fields may be used in the capture condition, if this field is specified. The Item Type in the Capture Definition must specify RUN if this field is used.
CM	B	Transmitted Flag	EQ, NE	Indicates whether the batch has been transmitted. <ul style="list-style-type: none"> <li>• Y – Yes</li> <li>• N – No</li> </ul>
<b>The following additional Capture Conditions apply to Sterling Connect processes (Sterling Gentran:Realtime users only)</b>				
CMOI CMII	B B	CICS Transaction ID	EQ, NE	The CICS Transaction ID which processed the exception. 4-character value
CMOI CMII	B B	Option	any	The Option number which processed the exception. 3-digit value
CMOI CMII	B B	Path ID	any	The Path ID which processed the exception. 3-digit value
CMOI CMII	B B	Queue File Number	any	The Queue File Number which contained the output data for the exception. 3-digit value

## EDIM625 – Exception Action Directory Screen

### Purpose

The Exception Action Directory allows you to list all Exception Action Definitions that have been created.

From this Directory you may quickly determine if the action you require has already been defined. If so, you may use the Action Definition in their Exception Profile.

This function is typically used by the Sterling Gentran:Viewpoint Administrator or the EDI Coordinator. However, end users may be given authorization to access this Directory.

```

EDIM625 9.3.5_____ EXCEPTION ACTION DIRECTORY      06/01/2011
Type Action, press Enter
   1=Add  4=Delete  5=Select  8=Usage

Action @MODEL-BAT
Type   _ (B=Batch, O=Online)
Status _ (E=Enable, D=Disable)

A Action           Description                                Type   Status
_ @MODEL-BAT  SAMPLE BATCH ACTION                           BATCH   D
_ @MODEL-ONL  SAMPLE ONLINE ACTION                            ONLINE  D
_
_
_
_
_
_
_
_
_
_

LAST ENTRY DISPLAYED
F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel

```

### Actions

**1=Add** Enter **1** on any line in the display list and press **Enter** to add an Exception Action Definition. The Exception Action Definition screen is displayed with all entry fields blank.

**4=Delete** Enter **4** on the line of the entry to be deleted, and press **Enter** to mark an Exception Action Definition for deletion. The Exception Action Definition is marked for deletion and will be deleted the next time Profiles Maintenance is run.

For more information on Profiles Maintenance, refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

Only Action Definitions which are not currently in use by an Exception Profile may be deleted.

**Note:** An Exception Action Definition that has been marked for deletion will display the description “ENTRY HAS BEEN MARKED FOR DELETION” and may not be updated from the Online Facility.

- 5=Select** Enter **5** on the line of the entry to be selected and press **Enter** to select an existing Exception Action Definition. The Exception Action Definition screen for the Exception Action Definition selected is displayed.
- 8=Usage** Enter **8** on the line of the entry to be selected and press **Enter** to transfer to the Usage Cross Reference screen. The Exception Profiles that use the selected Exception Action Definition are displayed.

### Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

#### Action

A 1- to 10-character field entered by the user. Control the entry, displayed at the top of the list, by entering the Action. You may enter partial names.

#### Type

A 1-character field entered by the user to limit the list to a specific action type.

- |              |           |
|--------------|-----------|
| <b>B</b>     | Batch     |
| <b>O</b>     | Online    |
| <b>blank</b> | All Types |

#### Status

A 1-character field entered by the user to limit the list to a specific action status.

- |              |  |
|--------------|--|
| <b>E</b>     | Enabled. Only actions which are enabled are displayed.   |
| <b>D</b>     | Disabled. Only actions which are disabled are displayed. |
| <b>blank</b> | All statuses are displayed.                              |

**A (Action)**

A 1-character field entered by the user to request an action. Refer to **Actions** above for details regarding the available actions for this screen.

**Action**

The Exception Action name is displayed in this column.

**Description**

The Exception Action description is displayed in this column.

**Note:** An exception action that has been marked for deletion will display the description “ENTRY HAS BEEN MARKED FOR DELETION”.

**Type**

The Exception Action type is displayed in this column.

**Status**

The current status for the Exception Action definition is displayed in this column.

## EDIM626 – Exception Action Definition Screen

### Purpose

The Exception Action Definition screen allows you to define actions for automatically initiating responses to exceptions that are captured. You may initiate a batch or an online user process.

From this screen, you are able to directly input data for use by the automated system. Sterling Gentran:Viewpoint will also pass data which can be used by the automated system. For more information about “Exception Actions” refer to Chapter 2, “Optional Features”.

Exception Action Definitions is typically be created by the Sterling Gentran:Viewpoint Administrator or the EDI Coordinator.

```

EDIM626 9.3.6_____ EXCEPTION ACTION DEFINITION 06/01/2011
Type Action, press Enter
  _ 1=Add 2=Update 4=Delete 8=Usage

Action . . . . @MODEL-BAT
Description . . SAMPLE_BATCH_ACTION_____
Type . . . . . B (B=Batch, O=Online)
Status . . . . . D (E=Enable, D=Disable)

Batch Procedure EDIVBACT

Online TransID ____

User Data Area
SYNTAX_FOR_AUTOMATED_BATCH_SYSTEM_MAY_BE_ENTERED_HERE. __THIS_WILL_BE__
PASSED_TO_THE_SYSTEM_ALONG_WITH_THE_CAPTURED_DATA. _____
_____
_____

F1=Help F3=Exit F12=Cancel

```

### Actions

- 1=Add** Enter **1** and press **Enter** to add a new Exception Action Definition. The Exception Action Definition is added to Sterling Gentran:Viewpoint.
- If the Exception Action already exists, an error message is displayed and the Exception Action will not be added.
- 2=Update** Enter **2** and press **Enter** to update the Exception Action Definition. The Exception Action definition is updated using the current screen field values.
- When the action is complete, the screen is redisplayed with a message indicating that the Exception Action Definition has been updated. If the entry does not exist, the screen is redisplayed with a message indicating that the Exception Action Definition was not found.
- 4=Delete** Enter **4** and press **Enter** to mark an Exception Action Definition for deletion. The Exception Action is marked for deletion and will be deleted the next time Profiles Maintenance is run.
- For more information on Profiles Maintenance refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** An Exception Action that has been marked for deletion may not be updated from the Online Facility. Only definitions not currently in use by an Exception Profile may be deleted.

**8=Usage** Enter **8** and press **Enter** to transfer to the Usage Cross Reference screen. The Exception Profiles that use the Exception Action Definition are displayed.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the following fields is entered by the user:

#### (Action)

A 1-character field to request an action for an Exception Action Definition. Refer to **Actions** above for details regarding the available actions for this screen.

#### Action

A 1- to 10-character field used to identify the name you want associated with the Exception Action.

#### Description

A 1- to 45-character field used to describe the Exception Action.

#### Type

A 1-character field to specify whether the action is a batch or online action.

<b>B</b>	Batch
<b>O</b>	Online

#### Status

A 1-character field used to control whether the action is enabled or disabled.

<b>E</b>	The action is performed for any Exception Profile that has specified the action.
<b>D</b>	The action is not performed for any Exception Profile that has specified the action.

### **Batch Procedure**

A 1- to 8-character field used to specify the user batch program name to be initiated by Sterling Gentran:Viewpoint. You must specify the "Type" field as "B" (batch) if you enter this field.

**Note:** If the user program is a batch program, you must specify the "Batch Procedure" field as the actual program name of the user program. The Batch Action Processor (EDIN200) program will invoke the user program and pass parameters related to the exception. For more information on the Batch Action Processor, refer to the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide*, Chapter 1, "Batch Program Descriptions".

### **Online TransID**

A 1- to 4-character field entered by the user to specify the CICS TransID that Sterling Gentran:Viewpoint should initiate.

**Note:** This is not affected by System Image.

### **User Data Area**

The User Data Area are 4 lines of free form text entered by the user which contain information to be passed to the action. The information entered may be data required by the specified Batch procedure or Online TransID (for example, control parameters).

## EDIM627 – User Message Directory Screen

### Purpose

The User Message Directory allows you to list all messages which Sterling Gentran:Viewpoint users have defined.

From this Directory, you may quickly determine if the message you need has already been defined.

```

EDIM627 9.3.7_____ USER MESSAGE DIRECTORY 06/01/2011
Type Action, press Enter
  1=Add  4=Delete  5=Select  8=Usage

User Message ID U999999

A  ID          User Message Text                               Severity
-  U999999 ACKNOWLEDGEMENT FROM PARTNER VENDOR-2 FOR PURCHASE ORDE WARNING
-
-
-
-
-
-
-
-
-
-
-
-
-
-

LAST ENTRY DISPLAYED
F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel
  
```

### Actions

**1=Add** Enter **1** on any line in the display list and press **Enter** to add a new User Message Definition. The User Message Definition screen is displayed with all entry fields blank.

**4=Delete** Enter **4** on the line of the entry to be deleted and press **Enter** to mark a User Message Definition for deletion. The User Message Definition is marked for deletion and will be deleted the next time Profiles Maintenance is run.

For more information on Profiles Maintenance, refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** A User Message Definition that has been marked for deletion is displayed with the description “ENTRY HAS BEEN MARKED FOR DELETION” and may not be updated. Only definitions not currently in use by an Exception Capture Definition may be deleted.

**5=Select** Enter **5** on the line of the entry to be selected and press **Enter** to select an existing User Message Definition. The User Message Definition screen for the User Message Definition selected is displayed.



**8=Usage** Enter **8** on the line of the entry to be selected and press **Enter** to transfer to the Usage Cross Reference screen. The Exception Capture Definitions that use the selected User Message Definition are displayed.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F7=Bkwd** Scroll backward through the list on the current screen.

**F8=Fwd** Scroll forward through the list on the current screen.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

#### User Message ID

A 7-character field, where the first character is fixed as "U" to identify the message as a user message. The last 6 digits are numbers entered by the user to identify the message. Use this field to control which message is displayed at the top of the list. You may enter partial User Message IDs.

#### A (Action)

A 1-character field entered by the user to request an action. Refer to **Actions** above for details regarding the available actions for this screen.

#### ID

The User Message ID is displayed in this column.

#### User Message Text

The user message text is displayed in this column.

**Note:** A user message that has been marked for deletion will display the description "ENTRY HAS BEEN MARKED FOR DELETION".

#### Severity

The severity defined to the user message is displayed in this column.

## EDIM628 – User Message Definition Screen

### Purpose

The User Message Definition screen allows Sterling Gentran:Viewpoint users to define messages which have explanations that are relevant and meaningful to them.

User Messages can be associated with Exception Capture Definitions. By attaching a User Message to an Exception Capture Definition, the User Message is available to end users while they are working on exceptions. The User Message can be used online at the time and place the end-user requires the information to resolve the exception.

The User Message is displayed for the current exception from the User Message Display screen in Exception Inquiry.

```

EDIM628 9.3.8 _____ USER MESSAGE DEFINITION 06/01/2011
Type Action, press Enter
  _ 1=Add 2=Update 4=Delete 8=Usage

User Message ID U999999
Severity . . . W (I=Information, W=Warning, E=Error, S=Severe, F=Fatal)

Text
  ACKNOWLEDGEMENT_FROM_PARTNER_VENDOR-2_FOR_PURCHASE_ORDER_IS _____
  OVERDUE. _____

Explanation
  VENDOR-2 HAS BEEN SET UP AS A JUST-IN-TIME SUPPLIER. ANY DELAY IN THEIR _____
  DELIVERIES MUST BE RESPONDED TO IMMEDIATELY. SEE USER PROCEDURE @JIT. _____
  _____
  _____
  _____
  _____
  _____

F1=Help F3=Exit F12=Cancel

```

### Actions

- 1=Add** Enter **1** and press **Enter** to add a new User Message Definition. The User Message Definition is added to the Sterling Gentran:Viewpoint system. If the User Message already exists, an error message is displayed and the User Message will not be added.
- 2=Update** Enter **2** and press **Enter** to update an existing User Message Definition. The User Message Definition is updated using the current screen field values.
- When the action is complete, the screen is redisplayed with a message indicating that the User Message Definition has been updated. If the entry does not exist, the screen will be redisplayed with a message indicating that the User Message Definition was not found.

**4=Delete** Enter **4** and press **Enter** to mark a User Message Definition for deletion. The User Message is marked for deletion and will be deleted the next time Profiles Maintenance is run.

For more information on Profiles Maintenance refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** A User Message that has been marked for deletion is displayed but may not be updated. Only definitions not currently in use by an Exception Capture Definition may be deleted.

**8=Usage** Enter **8** in the Action field and press **Enter** to transfer to the Usage Cross Reference screen. The Exception Capture Definitions that use the selected User Message Definition are displayed.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the following fields is entered by the user:

#### (Action)

A 1-character field used to request an action for the user message definition. Refer to **Actions** above for details regarding the available actions for this screen.

#### User Message ID

A 7-character field where the first character is fixed as "U" to identify the message as a user message. The last 6 characters are numbers entered by the user to identify the message. This value is used in the Exception Capture Definition to associate a User Message with an exception.

#### Severity

A 1-character field used to indicate the severity that should be associated with the defined message. The severity defined is for informational purposes only (that is, no action is initiated by Sterling Gentran:Viewpoint based on severity).

**I** Information

**W** Warning

<b>E</b>	Error
<b>S</b>	Severe
<b>F</b>	Fatal

**Text**

Two (2) lines of free-form text which describe the user message.

**Explanation**

Nine (9) lines of freeform text to explain the message being defined. This field is typically used to further detail the message or to describe possible causes.

## EDIM629 – User Procedure Directory Screen

### Purpose

The User Procedure Directory allows you to list all User Procedures which Sterling Gentran:Viewpoint users have defined in Exception Management.

From the User Procedure Directory, you may quickly determine which User Procedures have been defined.

```

EDIM629 9.3.9_____ USER PROCEDURE DIRECTORY 06/01/2011
Type Action, press Enter
  1=Add  4=Delete  5=Select  8=Usage

Procedure @MODEL-JIT

A Procedure Description
_ @MODEL-JIT PROCEDURE FOR HANDLING JUST-IN-TIME SUPPLIERS
_
_
_
_
_
_
_
_
_
_

LAST ENTRY DISPLAYED
F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel

```

### Actions

**1=Add** Enter **1** on any line in the display list and press **Enter** to add a new User Procedure Definition. The User Procedure Definition screen is displayed with all entry fields blank.

**4=Delete** Enter **4** on the line of the entry to be deleted and press **Enter** to mark a User Procedure Definition for deletion. The User Procedure Definition will be marked for deletion, and will be deleted the next time Profiles Maintenance is run.

For more information on Profiles Maintenance refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** A User Procedure that has been marked for deletion is displayed with the description "ENTRY HAS BEEN MARKED FOR DELETION" and may not be updated. Only definitions not currently in use by an Exception Capture Definition may be deleted.

**5=Select** Enter **5** on the line of the entry to be selected and press **Enter** to select an existing User Procedure Definition. The User Procedure Definition screen for the User Procedure Definition selected is displayed.

**8=Usage** Enter **8** on the line of the entry to be selected and press **Enter** to transfer to the Usage Cross Reference screen. The Exception Capture Definitions that use the selected User Procedure Definition are displayed.

## Function Keys

<b>F1=Help</b>	If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
<b>F3=Exit</b>	Returns to the previous menu.
<b>F7=Bkwd</b>	Scroll backward through the list on the current screen.
<b>F8=Fwd</b>	Scroll forward through the list on the current screen.
<b>F12=Cancel</b>	Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### Procedure

A 1- to 10-character field entered by the user. This field is used to control which user procedure is displayed at the top of the list. You may enter partial procedure names.

### A (Action)

A 1-character field entered by the user to request an action for a User Procedure. Refer to **Actions** above for details regarding the available actions for this screen.

### Procedure

The User Procedure name is displayed in this column.

### Description

The User Procedure description is displayed in this column.

**Note:** A user procedure that has been marked for deletion will display the description "ENTRY HAS BEEN MARKED FOR DELETION".

## EDIM630 – User Procedure Definition Screen

### Purpose

The User Procedure Definition screen allows you to document actions, steps, or procedures that should be followed when resolving an exception.

User Procedures can be attached to Exception Capture Definitions. By attaching a User Procedure to an Exception Capture Definition, the User Procedure will be available to end users while they are working on exceptions. The User Procedure can be used online at the time and place the end user requires the information to resolve the exception.

The User Procedure is displayed in Exception Inquiry from the User Procedure Display screen for the current exception.

```

EDIM630 9.3.10_____ USER PROCEDURE DEFINITION                                06/01/2011
Type Action, press Enter
  _ 1=Add 2=Update 4=Delete 8=Usage

Procedure  @MODEL-JIT
Description PROCEDURE_FOR_HANDLING_JUST-IN-TIME_SUPPLIERS

Procedure
1.  __INFORM_PURCHASING. _____
2.  __CALL_SUPPLIER. _____
3.  __IDENTIFY_PO_ITEM. _____
4.  __UPDATE_MRP_FOR_IMPACT. _____
_____
_____
_____
_____
_____
_____
_____
_____
_____

F1=Help  F3=Exit  F12=Cancel

```

### Actions

- 1=Add** Enter **1** and press **Enter** to add a new User Procedure Definition. The User Procedure Definition displayed is added to Sterling Gentran:Viewpoint. If the User Procedure Definition already exists, an error message is displayed and the User Procedure will not be added.
- 2=Update** Enter **2** and press **Enter** to update the User Procedure Definition. The User Procedure Definition is updated using the current screen field values.
- When the action is complete, the screen is redisplayed with a message indicating that the User Procedure Definition has been updated. If the entry does not exist, the screen is redisplayed with a message indicating that the User Procedure Definition was not found.
- 4=Delete** Enter **4** and press **Enter** to mark a User Procedure Definition for deletion. The User Procedure Definition is marked for deletion and will be deleted the next time Profiles Maintenance is run.

For information on Profiles Maintenance refer to "File Maintenance Procedures" in Chapter 2, "Operational Procedures".

**Note:** A User Procedure that has been marked for deletion is displayed but may not be updated. Only definitions not currently in use by an Exception Capture Definition may be deleted.

**8=Usage** Enter **8** and press **Enter** to transfer to the Usage Cross Reference screen. The Exception Capture Definitions that use the User Procedure Definition are displayed.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the following fields is entered by the user:

#### (Action)

A 1-character field used to request an action for the User Procedure Definition.

Refer to **Actions** above for details regarding the available actions for this screen.

#### Procedure

A 1- to 10-character field to name the User Procedure. This value is used in the Exception Capture Definition to associate a User Procedure with an exception.

#### Description

A 1- to 45-character field to describe the User Procedure that is being created.

#### Procedure

Thirteen lines of free-form text to document steps or a procedure that should be followed. The procedure entered here may be used for a specific exception or may be a general procedure which is attached to more than one Exception Capture Definition.



## EDIM631 – Usage Cross Reference Screen

### Purpose

The Usage Cross Reference screen allows you to quickly determine where various Sterling Gentran:Viewpoint Exception Management components are referenced within the Exception Management module.

```
EDIM631 9.3.11____          USAGE CROSS REFERENCE          06/01/2011
Type Action, press Enter
  5=Select

Name . . . @MODEL-JIT
Type . . . 5 (1=Capture, 2=Recipient, 3=Action, 4=User Message,
             5=User Procedure, 6=Batch Action, 7=Online Action)

A Component      Name              Description
- CAPTURE ID    @MODEL-AR    CAPTURE ACKNOWLEDGEMENTS NOT ACCEPTED
- CAPTURE ID    @MODEL-RAR    CAPTURE ACKS NOT ACCEPTED - REALTIME
-
-
-
-
-
-
-
-
-
-

LAST ENTRY DISPLAYED
F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel
```

### Actions

- 5=Select**      Enter **5** on the line of the entry to be selected and press **Enter** to transfer. The type of entry selected determines the destination.
- If the component is Profile ID, transfer to the Exception Profile Definition screen.
  - If the component is Capture ID, transfer to the Exception Capture Definition screen.
  - If the component is Action ID, transfer to the Exception Action Definition screen.

### Function Keys

- F1=Help**      If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit**      Returns to the previous menu.
- F7=Bkwd**      Scroll backward through the list on the current screen.
- F8=Fwd**        Scroll forward through the list on the current screen.
- F12=Cancel**    Back up in the dialog, one screen at a time. Update is not performed on the current object.

---

## Field Descriptions

**(Jump Code)**

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for each of the following fields is entered by the user:

**Name**

A 1- to 10-character field used to specify the name of the component to cross reference.

**Type**

A 1-character field to specify the type of component to cross reference. Valid values are:

1	=	Capture
2	=	Recipient
3	=	Action
4	=	User Message
5	=	User Procedure
6	=	Batch Action
7	=	Online Action

**A (Action)**

A 1-character field entered by the user to request an action for the specified entry. Refer to **Actions** above for details regarding the available actions for this screen.

**Component**

The type of the cross referenced component is displayed in this column. Valid values are:

Profile ID  
 Capture ID  
 Action ID

**Name**

The name of the cross referenced component is displayed in this column.

**Description**

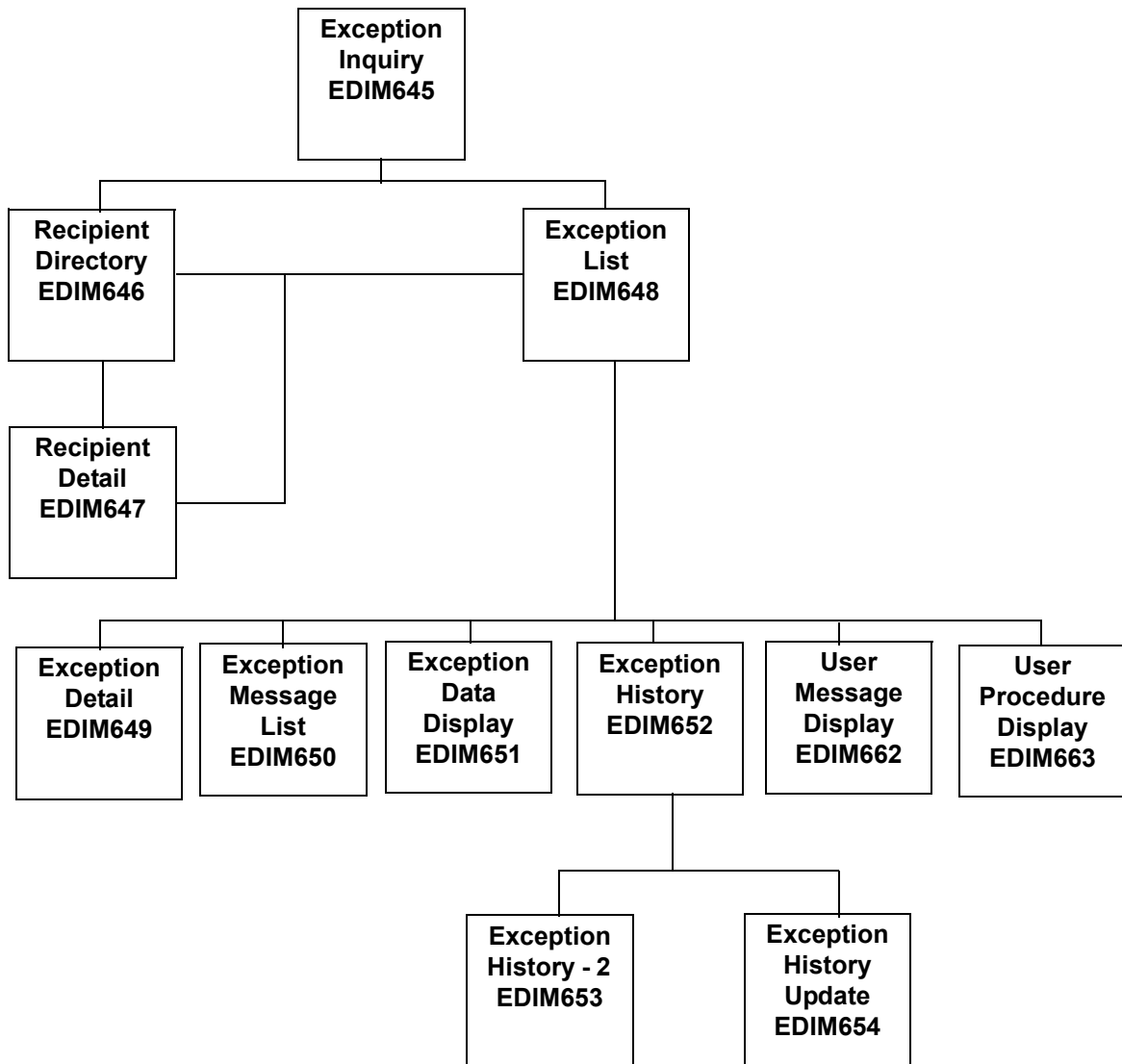
The description of the cross referenced component is displayed in this column.

## Exception Inquiry Screens

### Exception Inquiry Navigation

The functions in Exception Inquiry allow a user to respond to and resolve exceptions captured by Sterling Gentran:Viewpoint. The purpose of each screen and how to use their fields are described in detail in this section.

Navigation for Exception Inquiry is illustrated in Figure 5.4.



**Figure 5.4 Exception Inquiry Navigation**

## EDIM645 – Exception Inquiry Menu

### Purpose

The Exception Inquiry Menu provides you with direct access to the primary functions of Exception Inquiry. Exception Inquiry allows you to manage exceptions from either the recipient or exception level.

The typical users of Exception Inquiry are the end users of Sterling Gentran:Viewpoint. Sterling Gentran:Viewpoint end users are considered to be the users who are ultimately responsible for managing business documents travelling through the extended EDI system.

```

EDIM645 9.4 _____      EXCEPTION INQUIRY MENU      06/01/2011

      Select one of the following.

      - 1. Recipient Directory
        2. Exception List

F1=Help  F3=Exit
  
```

The Exception Inquiry Menu contains two options which are listed below. The list of menu options, as well as a brief description of each option, follows.

Menu Option	Description
1. Recipient Directory	Provides a list of all recipients defined in Exception Profiles.
2. Exception List	Provides a list of all exceptions captured for a single recipient. The status of each exception is also displayed.

## EDIM646 – Recipient Directory Screen

### Purpose

The Recipient Directory provides a list of all recipients which are defined in Exception Profiles. At a glance, a user can determine if there are any exceptions for them.

From the Recipient Directory a user may select detailed status information for a recipient or display a list of exceptions for a recipient.

```

EDIM646 9.4.1_____ RECIPIENT DIRECTORY 06/01/2011
Type Action, press Enter. 12:00:00
 4=Delete 5=Select 6=ExcpList

Recipient @ACKREC___

A Recipient Description Excp Last Activity
Count Date Time
_ @ACKREC ACKNOWLEDGEMENT RECONCILIATION ERRORS 00000 00/00/00 00:00
_ @COMM-ERRS COMMUNICATIONS MONITOR 00000 00/00/00 00:00
_ @EDITORS EDI COMPLIANCE MONITOR 00000 00/00/00 00:00
_ @FATAL FATAL ERRORS 00000 00/00/00 00:00
_ @MAPPERIN INBOUND MAPPING ERRORS 00000 00/00/00 00:00
_ @MAPPEROUT OUTBOUND MAPPING ERRORS 00000 00/00/00 00:00
_ @SUSPENSE SUSPENSE ERRORS 00000 00/00/00 00:00
_
_
_
_
_
LAST ENTRY DISPLAYED
F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel Enter=Refresh

```

### Actions

**4=Delete** Enter **4** on the line of the recipient to be deleted and press **Enter** to mark a recipient for deletion. The recipient is marked for deletion and will be deleted the next time Sterling Gentran:Viewpoint Repository Maintenance runs.

A recipient can be restored from the archive file after maintenance has deleted it from the file. For more information on Repository Maintenance refer to “File Maintenance Procedures” in Chapter 2, “Operational Procedures”.

**Note:** A recipient that has been marked for deletion displays the description “ENTRY HAS BEEN MARKED FOR DELETION” and may not be updated.

**5=Select** Enter **5** on the line of the recipient to be selected and press **Enter** to display the Recipient Detail screen for that recipient.

**6=ExcpList** Enter **6** on the line of the recipient to be listed and press **Enter** to display the Exception List screen for the recipient.

### Function Keys

**Enter=Refresh** Refreshes the screen.

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

The information for the next two fields is entered by the user:

### Recipient

A 1- to 10-character field. Control the entry displayed at the top of the list by entering the Recipient Name required. Partial names may be used.

### A (Action)

A 1-character field used to request an action for a recipient. Refer to **Actions** above for details regarding the available actions for this screen.

### Recipient

The recipient name is displayed in this column.

**Note:** If your Sterling Gentran User ID is restricted by security to access only a single Recipient, this field is protected and you cannot over-type it.

### Description

The description for the recipient is displayed in this column.

**Note:** A recipient that has been marked for deletion displays the description "ENTRY HAS BEEN MARKED FOR DELETION".

### Excp Count

The number of exceptions captured by Sterling Gentran:Viewpoint for the recipient is displayed in this column. All exception status types are included in the count (for example: open, reviewed, transferred, closed).

### Last Activity

Displays the last date and time that activity occurred in Sterling Gentran:Viewpoint for the recipient. For example, if an exception is transferred from one recipient to another recipient the **Last Activity** shows the date and time of the transfer.

---

## EDIM647 – Recipient Detail Screen

### Purpose

The Recipient Detail screen displays the number of exceptions, by status, currently being monitored for a recipient. This screen allows the user to display all exceptions for a recipient.

```
EDIM647 _____ RECIPIENT DETAIL 06/01/2011
Type Action, press Enter.
_ 6=ExcpList

Recipient . . @MAPPERIN_ INBOUND MAPPING ERRORS

Last Activity: 06/01/2011 - 12:00

EXCEPTIONS
Status Count
OPEN 00001
REVIEW 00000
TRANSFR 00000
CLOSED 00000

TOTAL 00001

F1=Help F3=Exit F12=Cancel
```

### Actions

**6=ExcpList** Enter **6** in the Action field and press **Enter** to display the Exception List screen for the recipient.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

**(Action)**

A 1-character field entered by the user to request an action. Refer to **Actions** above for details regarding the available actions for this screen.

**Recipient**

A 1- to 10-character field entered by the user. This field controls which recipient is displayed. The user may over-type this field to change which recipient is displayed. The description for the recipient is also displayed in this field.

**Note:** If your Sterling Gentran User ID is restricted by security to access only a single Recipient, this field is protected and you cannot over-type it.

**Last Activity**

Displays the last date and time activity occurred in Sterling Gentran:Viewpoint for the recipient. For example, if an exception is transferred from this recipient to another recipient, the **Last Activity** shows the date and time of the transfer.

**Status**

This column displays the status type for the count.

<b>Open</b>	Exceptions which are open.
<b>Review</b>	Exceptions which are in review.
<b>Trnsfr</b>	Exceptions which have been transferred to this recipient.
<b>Closed</b>	Exceptions which have been closed.
<b>Total</b>	Total of all exceptions.

**Count**

Displays the number of exceptions captured by Sterling Gentran:Viewpoint for each status.



## EDIM648 – Exception List Screen

### Purpose

The Exception List screen allows you to list all exceptions, and their statuses, that have been captured for a recipient.

The order in which exceptions are listed is controlled by using the Order By Control option in the Tracking Point Definition. The default order for exceptions is by System and Process. Optionally, you can specify three additional fields. Refer to “EDIM603 – Sterling Tracking Point Definition Screen” in Chapter 5, “Screen Descriptions” for more details regarding Order By Control.

From the Exception List screen, you have flexible control of exceptions using the actions available from this screen. Refer to **Actions**, documented below, for more details regarding the actions available.

```

EDIM648 9.4.2 _____ EXCEPTION LIST 06/01/2011
Type Action, press Enter.
 4=Delete 5=Select 6=MsgList 7=Data 8=UserMsg 9=UserProc 10=ExcpHist 11=Recip

Recipient . . @EDITORS_ EDI COMPLIANCE MONITOR
Date From . . _____ To _____
Excp Status  A (A=All, O=Open, C=Closed, R=Reviewed, T=Transferred)

A System      Process Reference      /000000007 /000070001  O 06/01/11
  GENTRAN     EBDI001  000000005
  GENTRAN     EBDI002  000000008
  GENTRAN     EDIR001  000000006 /000000008 /000080001  O 06/01/11
  GENTRAN     EDIR002  000000009
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____
  _____

LAST ENTRY DISPLAYED
F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel

```

### Actions

**4=Delete** Enter **4** on the line of the exception to be deleted and press **Enter** to mark an exception for deletion. The exception is marked for deletion, and will be deleted the next time Sterling Gentran:Viewpoint Repository Maintenance is run.

You can restore an exception from the archive file after maintenance has deleted it from the file. For more information on Repository Maintenance, refer to “File Maintenance Procedures” in Chapter 2, “Operational Procedures”.

**Note:** An exception that has been marked for deletion, is displayed with the description “ENTRY HAS BEEN MARKED FOR DELETION” and may not be updated.

**5=Select** Enter **5** on the line of the exception to be selected and press **Enter**. The Exception Detail screen for the selected exception is displayed.

- 
- 6=MsgList** Enter **6** and press **Enter** to display the Exception Message List screen for the selected exception.
- 7=Data** Enter **7** and press **Enter** to display the data for the selected exception. For exceptions captured from the Sterling Gentran translation system, the Exception Data Display screen displays the data for the exception. For exceptions captured from the Sterling Connect communications system, the Sterling Gentran:Plus Interchange Detail screen (EDIM402) displays the data for the exception.
- 8=UserMsg** Enter **8** and press **Enter** to display the User Message screen for the selected exception. A User Message may be associated with the exception from the Capture Definition that captured the exception.  
  
For more information on User Messages, refer to "User Messages" in Chapter 2, "Optional Features".
- 9=UserProc** Enter **9** and press **Enter** to display the User Procedure screen for the selected exception. A user procedure may be associated with the exception from the Capture Definition that captured the exception.  
  
For more information on User Procedures, refer to "User Procedures" in Chapter 2 "Optional Features".
- 10=ExcpHist** Enter **10** and press **Enter** to display the Exception History screen for the selected exception.
- 11=Recip.** Enter **11** and press **Enter** to display the Recipient Detail screen for the recipient to which the selected exception belongs.

## Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### Recipient

A 1- to 10-character field entered by the user to control which recipient's exceptions are listed. Over-type this field and press **Enter** to select exceptions for different recipients. The description for the recipient is also displayed in this field.

**Note:** If your Sterling Gentran User ID is restricted by security to access only a single Recipient, this field is protected and you cannot over-type it.

### **Date From**

A 10-position alphanumeric field used to limit the list of Repository Exception Records displayed on this screen. This field is used to indicate the date with which you want the list of exception records to begin. The date format is MM/DD/YYYY. If a Date From is not entered, then the list will begin with the first Repository Exception Record found on the file.

### **(Date) To**

A 10-position alphanumeric field used in conjunction with Date From to limit the list of Repository Exception Records displayed on this screen. This field is used to indicate the date with which you want the list of exception records to end. The date format is MM/DD/YYYY.

### **Excp Status**

A 1-character field entered by the user to limit the display of exceptions with a particular status.

<b>A</b>	All statuses are listed.
<b>O</b>	List only exceptions which are opened.
<b>C</b>	List only exceptions which have been closed.
<b>R</b>	List only exceptions which are in review.
<b>T</b>	List only exceptions which have been transferred.

### **A (Action)**

A 1- to 2-character field entered by the user to request an action for an exception. Refer to **Actions** above for details regarding the available actions for this screen.

### **System**

The system that was processing the exception when it was captured by Sterling Gentran:Viewpoint is displayed in this column.

### **Process**

The process that was operating when the exception was captured by Sterling Gentran:Viewpoint is displayed in this column.

### **Reference**

Displays the reference identification of the exception.

For EDI exceptions, the reference is the Envelope Reference IDs.

For application exceptions, this field will display the reference for the exception as defined in mapping.

For communications exceptions, the reference is the Batch ID.

**Note:** An exception that has been marked for deletion will display the reference “ENTRY HAS BEEN MARKED FOR DELETION”.

**S (Status)**

The current status of the exception is displayed in this column.

- O** Exception is currently open.
- R** Exception is currently in review.
- T** Exception has been transferred.
- C** Exception has been closed.

**Date**

The tracking point date for the Repository Exception record. This is the date that the exception record was added to the file. The date is displayed in the format MM/DD/YY.

## EDIM649 – Exception Detail Screen – Sterling Gentran Item

### Purpose

The Exception Detail – Sterling Gentran Item screen provides you with detailed information for a single exception. Some of the information includes actions initiated by Sterling Gentran:Viewpoint for the exception, the name of the Trading Partner is, and to which application the exception belongs.

From the Exception Detail screen you have flexible control over the exception using the actions available from this screen. Refer to the **Actions** field description documented below for more details regarding the available actions.

The following is an example of the Sterling Gentran:Basic Exception Detail Screen in Partner/Qualifier mode.

```
EDIM649 _____ EXCEPTION DETAIL 06/01/2011
Type Action, press Enter.
  4=Delete 6=MsgList 7=Data 8=UserMsg 9=UserProc 10=ExcpHist 11=Recip.
  12=ItemExcp

Recipient . . . : @MAPPERIN INBOUND MAPPING ERRORS
Excp Status . . : OPEN 06/01/2011 12:00
Excp Tag . . . : 0000000003
User Reference: INV01

System/Process: GENTRAN /EBDI041 Excp. Action:
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Capture ID . . . : @MODEL-IM Databank: GENTRAN
Description . . : INBOUND MAPPING ERRORS

Application : INVFILE Interchange: 000000005
Network . . . : Group: 000000007
Direction/Set : INBOUND /810 Trans: 000070001
Partner . . . : VENDOR-1
Qual . . . . :

F1=Help F3=Exit F6=Next F12=Cancel
```

The following is an example of the Sterling Gentran:Basic Exception Detail Screen in Relationship mode.

```

EDIM649 _____ EXCEPTION DETAIL 06/01/2011
Type Action, press Enter.
  _ 4=Delete 6=MsgList 7=Data 8=UserMsg 9=UserProc 10=ExcpHist 11=Recip.
    12=ItemExcp

Recipient . . . : @MAPPERIN INBOUND MAPPING ERRORS
Excp Status . . : OPEN 06/01/2011 12:00
Excp Tag . . . : 0000000003
User Reference: INV01

System/Process: GENTRAN /EBDI041 Excp. Action:
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Capture ID. . . : @MODEL-IM Databank: GENTRAN
Description . . : INBOUND MAPPING ERRORS

Application : INVFILE Interchange: 000000005
Network . . . : Group: 000000007
Direction/Set : INBOUND /810 Trans: 000070001
User . . . . : YOUR COMPANY
Partner . . . : THEIR COMPANY

F1=Help F3=Exit F6=Next F12=Cancel
    
```

The following is an example of the Sterling Gentran:Realtime Exception Detail Screen in Partner/Qualifier mode.

```

EDIM649 _____ EXCEPTION DETAIL 06/01/2011
Type Action, press Enter.
  _ 4=Delete 6=MsgList 7=Data 8=UserMsg 9=UserProc 10=ExcpHist 11=Recip.
    12=ItemExcp

Recipient . . . : @MAPPERIN INBOUND MAPPING ERRORS
Excp Status . . : OPEN 06/01/2011 12:00
Excp Tag . . . : 0000000076
User Reference: INV01

System/Process: GENTRAN /EDIR041 Excp. Action:
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Capture ID. . . : @MODEL-RIM Databank: REALTIME
Description . . : INBOUND MAPPING ERRORS - REALTIME

Application : INVFILE Interchange: 000000006
Network . . . : Group: 000000008
Direction/Set : INBOUND /810 Trans: 000080001
Partner . . . : VENDOR-1
Qual . . . . : Path / Option: 203/203
Trans ID/Task : EDIT/0000189 Queue File:

F1=Help F3=Exit F6=Next F12=Cancel
    
```

The following is an example of the Sterling Gentran:Realtime Exception Detail Screen in Relationship mode.

```

EDIM649 _____ EXCEPTION DETAIL 06/01/2011
Type Action, press Enter.
  _ 4=Delete 6=MsgList 7=Data 8=UserMsg 9=UserProc 10=ExcpHist 11=Recip.
    12=ItemExcp

Recipient . . . : @MAPPERIN INBOUND MAPPING ERRORS
Excp Status . . : OPEN 06/01/2011 12:00
Excp Tag . . . : 0000000076
User Reference: INV01

System/Process: GENTRAN /EDIR041 Excp. Action:
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Capture ID. . . : @MODEL-RIM Databank: REALTIME
Description . . : INBOUND MAPPING ERRORS - REALTIME

Application : INVFILE Interchange: 000000006
Network . . . : Group: 000000008
Direction/Set : INBOUND /810 Trans: 000080001
User . . . . : YOUR COMPANY
Partner . . . : THEIR COMPANY Path / Option: 203/203
Trans ID/Task : EDIT/0000189 Queue File:

F1=Help F3=Exit F6=Next F12=Cancel
    
```

## Actions

- 4=Delete**      Enter **4** and press **Enter** to mark an exception for deletion. The exception and all associated data are marked for deletion and will be deleted the next time Sterling Gentran:Viewpoint Repository Maintenance is run.

An exception can be restored from the archive file after maintenance has deleted it from the file. For more information on Repository Maintenance, refer to “File Maintenance Procedures” in Chapter 2, “Operational Procedures”.

**Note:** An exception that has been marked for deletion, is displayed, but may not be updated.
- 6=MsgList**     Enter **6** and press **Enter** to display the Exception Message List for the exception.
- 7=Data**        Enter **7** and press **Enter** to display the Exception Data Display screen for the exception.
- 8=UserMsg**     Enter **8** and press **Enter** to display the User Message screen for an exception. You may associate a user message with the exception from the Capture Definition that captured the exception.

For more information on User Messages, refer to "User Messages" in Chapter 2, "Optional Features".
- 9=UserProc**    Enter **9** and press **Enter** to display the User Procedure screen for an exception. You may associate a user procedure with the exception from the Capture Definition that captured the exception.

For more information on User Procedures, refer to "User Procedures" in Chapter 2 "Optional Features".

- 10=ExcpHist** Enter **10** in the Action field, and press **Enter** to display the Exception History screen for an exception.
- 11=Recip.** Enter **11** and press **Enter** to display the Recipient Detail screen for the recipient to which the exception belongs.
- 12=ItemExcp** Enter **12** and press **Enter** to return to the Item Exception Status screen (EDIM718) for the exception. This action is **ONLY** available when the Item Exception Status screen (EDIM718) was used to transfer this screen.

## Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F6=Next** Displays the next exception for the recipient.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1- to 2-character field entered by the user to request an action for the exception. Refer to **Actions** above for details regarding the available actions for this screen.

### Recipient

The recipient to which the exception belongs is displayed in this field. The recipient description is also displayed in this field.

### CC=Y

If the recipient was defined as a carbon copy in the Exception Profile, this indicator will be suffixed to the recipient description.

### Excp Status

The current status for the exception is displayed in this field. This field also displays the date and time when the current status was entered for the exception.

- |               |                                 |
|---------------|---------------------------------|
| <b>Open</b>   | Exception is OPEN.              |
| <b>Review</b> | Exception is in REVIEW.         |
| <b>Trnsfr</b> | Exception has been TRANSFERRED. |
| <b>Closed</b> | Exception is CLOSED.            |



**Excp Tag**

The exception tag for the exception is displayed in this column. The exception tag provides a unique identification for each exception being monitored by Sterling Gentran:Viewpoint.

**User Reference**

The User Reference is displayed in this field. This field will display the reference for the exception as defined in mapping.

**System/Process**

The system and process that was processing the exception when it was captured by Sterling Gentran:Viewpoint is displayed in this field.

**Excp. Action**

The name of the exception action initiated for the exception is displayed in this field.

**Date-Time**

The date (MM/DD/YYYY) and time (HH:MM) the exception was captured is displayed in this field.

**Action Dt-Tm**

The date (MM/DD/YYYY) and time (HH:MM) the action was initiated for the exception is displayed in this field.

**Capture ID**

The Exception Capture definition used to capture this exception is displayed in this field.

**Databank**

The Databank System used to process the exception is displayed in this field.

**Description**

The description associated with the Capture ID is displayed in this field.

**Application**

The application to which the exception belongs is displayed in this field. The application originates from either the trading profile used for the exception or the user application tracking point.

**Interchange**

The EDI Interchange Envelope Reference ID is displayed in this field.

**Network**

The network to which the exception belongs is displayed in this field. The network originates from either the trading profile used for the exception or the user application tracking point.

**Group**

The EDI Group Envelope Reference ID is displayed in this field.

**Direction/Set**

The direction of the exception and the EDI transaction set ID are displayed in this field.

**Dir.** Inbound From partner to user.  
Outbound From user to partner.

**Set** A 6-character transaction set ID; this can be any of the supported EDI standards documents (for example X12, TDCC, EDIFACT, or Tradacoms).

**Trans**

The EDI Transaction Envelope Reference ID is displayed in this field.

**User (Partner)**

The Trading Profile User ID used by translation for the exception is displayed in this field.

Based on the trading profile mode defined, this field may be displayed as either the User ID or the Partner ID.

**Partner (Partner Qual)**

The Trading Profile Partner ID used for translation for the exception is displayed in this field.

Based on the trading profile mode defined this field may be displayed as either the Partner ID or the Partner Qualifier.

**Path / Option**

The Path ID and Option Number used to process the exception are displayed in this field.

This is only available for Sterling Gentran:Realtime exceptions.

**Trans ID/Task**

The CICS Transaction ID and Task Number used to process the exception are displayed in this field. This is only available for Sterling Gentran:Realtime exceptions.

**Queue File**

The Queue File Number used to process the exception is displayed in this field. This is only available for Sterling Gentran:Realtime exceptions.

## EDIM649 – Exception Detail Screen – Sterling Connect Item

### Purpose

This screen is only available for Sterling Gentran:Plus users who have enabled communications monitoring in Sterling Gentran:Viewpoint.

The Exception Detail – Sterling Connect Item screen provides the user with detailed information for a single exception captured within the Sterling Connect communications system. Some of the information provided includes actions that have been initiated by Sterling Gentran:Viewpoint for the exception, who the Remote ID is, and what was the Batch Number assigned to the data.

From the Exception Detail screen a user has flexible control over the exception using the actions available from this screen. Refer to the **Actions** field description documented below for more details regarding the available actions.

```

EDIM649 _____ EXCEPTION DETAIL 06/01/2011
Type Action, press Enter.
  4=Delete 6=MsgList 7=Data 8=UserMsg 9=UserProc 10=ExcpHist 11=Recip.
 12=ItemExcp

Recipient . . . : @COMM-ERRS COMMUNICATIONS MONITOR
Excp Status . . : OPEN 06/01/2011 12:00
Excp Tag . . . : 0000000022
User Reference: BATCH WITHOUT $$ADD

System/Process: CONNECT /STOUTL Excp. Action:
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Capture ID. . . : @MODEL-OU
Description . . : CONNECT OFFLINE UTILITIES ERRORS

Batch ID . . . : BATCH WITHOUT $$ADD Direction . . : INBOUND
Batch Number : 0000211 Status . . . : EXTRACTED
Failure Code : 000
MBX/RMT ID . . : REMOTE2

F1=Help F3=Exit F6=Next F12=Cancel

```

### Actions

**4=Delete** Enter **4** and press **Enter** to mark an exception for deletion. The exception, and all associated exceptions are marked for deletion and will be deleted the next time Sterling Gentran:Viewpoint Repository Maintenance runs.

An exception can be restored from the archive file after maintenance has deleted it from the file. For more information on Repository Maintenance refer to “File Maintenance Procedures” in Chapter 2, “Operational Procedures”.

**Note:** An exception that has been marked for deletion is displayed but may not be updated.

**6=MsgList** Enter **6** and press **Enter** to display the Exception Message List screen for the exception.

- For communications exceptions, the explanation text for the Sterling Connect Failure Code is displayed on the Exception Message List screen.
- 7=Data** Enter **7** and press **Enter** to display the Sterling Gentrans:Plus Interchange Detail screen (EDIM402) for the exception.
- 8=UserMsg** Enter **8** and press **Enter** to display the User Message screen for an exception. You may associate a user message with the exception from the Capture Definition that captured the exception.
- For more information on User Messages, refer to "User Messages" in Chapter 2, "Optional Features".
- 9=UserProc** Enter **9** and press **Enter** to display the User Procedure screen for an exception. You may associate a user procedure with the exception from the Capture Definition that captured the exception.
- For more information on User Procedures, refer to "User Procedures" in Chapter 2 "Optional Features".
- 10=ExcpHist** Enter **10** and press **Enter** to display the Exception History screen for an exception.
- 11=Recip.** Enter **11** and press **Enter** to display the Recipient Detail screen for the recipient to which the exception belongs.
- 12=ItemExcp** Enter **12** and press **Enter** to return to the Item Exception Status screen (EDIM718) for the exception. This action is **ONLY** available when the Item Exception Status screen (EDIM718) was used to transfer to this screen.

## Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F6=Next** Displays the next exception for the recipient.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1- to 2-character field entered by the user to request an action for the exception. Refer to **Actions** above for details regarding the available actions for this screen.

### Recipient

The recipient to which the exception belongs is displayed in this field. The recipient description is also displayed in this field.

**CC=Y**

If the recipient was defined as a carbon copy in the Exception Profile, this indicator will be suffixed to the recipient description.

**Excp Status**

The current status for the exception is displayed in this field. This field also displays the date and time when the current status was entered for the exception.

<b>Open</b>	Exception is OPEN.
<b>Review</b>	Exception is in REVIEW.
<b>Trnsfr</b>	Exception has been TRANSFERRED.
<b>Closed</b>	Exception is CLOSED.

**Excp Tag**

The exception tag for the exception is displayed in this column. The exception tag provides a unique identification for each exception being monitored by Sterling Gentran:Viewpoint.

**User Reference**

The User Reference is displayed in this field. This field will display the Batch ID assigned to the communications batch.

**System/Process**

The system and process that was processing the exception when it was captured by Sterling Gentran:Viewpoint is displayed in this field.

**Excp. Action**

The name of the exception action initiated for the exception is displayed in this field.

**Date-Time**

The date (MM/DD/YYYY) and time (HH:MM) the exception was captured is displayed in this field.

**Action Dt-Tm**

The date (MM/DD/YYYY) and time (HH:MM) the action was initiated for the exception is displayed in this field.

**Capture ID**

The Exception Capture definition used to capture this exception is displayed in this field.

**Description**

The description associated with the Capture ID is displayed in this field.

**Batch ID**

The Batch ID assigned to the communications batch is displayed in this field.

**Direction**

The direction of the communications batch is displayed in this field.

**Batch Number**

The Batch Number assigned to the communications batch by the Sterling Connect system is displayed in this field.

**Status**

The status of the communications batch is displayed in this field.

<b>ADDED</b>	The batch was added to the Sterling Connect Data Queue by the Sterling Connect Offline Utilities.
<b>TRANSMITTED</b>	The batch was sent to its destination by the Sterling Connect system.
<b>COLLECTED</b>	The batch was received from its originator by the Sterling Connect system.
<b>EXTRACTED</b>	The batch was extracted from the Sterling Connect Data Queue by the Sterling Connect Offline Utilities.

**Failure Code**

The Failure Code associated with the communications error is displayed in this field. This field will be blank or zeros if no communications errors were encountered for the communications batch. To see the explanation for a failure code enter a **6** in the Action field and press **Enter** to display the Failure Code text on the Exception Message List screen.

**MBX/RMT ID**

The Mailbox/Remote ID associated with the communications batch is displayed in this field.



For more information on User Messages, refer to "User Messages" in Chapter 2, "Optional Features".

**9=UserProc** Enter **9** and press **Enter** to display the User Procedure screen for the exception. You may associate a user procedure with the exception from the Capture Definition that captured the exception.

For more information on User Procedures, refer to "User Procedures" in Chapter 2 "Optional Features".

**10=ExcpHist** Enter **10** and press **Enter** to display the Exception History screen for the exception.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F6=Next** Displays the next exception for the recipient. The Exception Message List screen for the next exception is displayed.

**F7=Bkwd** Scroll backward through the list on the current screen.

**F8=Fwd** Scroll forward through the list on the current screen.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### System

The system which was processing the exception when it was captured by Sterling Gentran:Viewpoint is displayed in this field.

### Process

The process which was processing the exception when it was captured by Sterling Gentran:Viewpoint is displayed in this field.

### Desc.

The description from the Exception Capture definition responsible for capturing the exception is displayed in this field.

### Reference

Displays the reference identification of the exception.

For EDI exceptions the reference is the Envelope Reference IDs.

For Application exceptions, the reference is defined in mapping.

For communication exceptions, the reference is the Batch ID.



### **A (Action)**

A 1- to 2-character field entered by the user to request an action for an exception. Refer to **Actions** above for details regarding the available actions for this screen.

### **Message**

For exceptions originating from the Sterling Gentrans system, the messages issued by the tracking point (system/process) are displayed in this column.

For exceptions originating from the Sterling Connect communications system, the explanation text associated with the system Failure Code is displayed in this column.

## EDIM651 – Exception Data Display Screen

### Purpose

The Exception Data Display Screen allows you to view the data for an exception. Sterling Gentran:Viewpoint inserts all system messages and user messages into the data for the user. Messages inserted in the data are highlighted with an asterisk (\*). You may scroll through the data or move from message to message using the **F6=Next** function key.

**Note:** The Databank must have a Message Store-Level configuration for data to be available to the Exception Data Display screen.

```

EDIM651 _____ EXCEPTION DATA DISPLAY 06/01/2011
Type Action, press Enter.
  __ 6=Excp 7=MsgList 8=UserMsg 9=UserProc 10=ExcpHist

System   : GENTRAN
Process  : EBDI001
Desc.    : INBOUND COMPLIANCE ERRORS
Reference: 000000005 /000000007 /000070001

Exception Data
ST*810*000070001?
BIG*90QQ05*INV01*901101*PONUMBER-001?
* 33      3 BIG  1   90QQ05   DATE FIELD NOT NUMERIC.
NTE**-----?
NTE**          TERMS ARE SPECIFIED BELOW?
NTE** DISCOUNT WILL NOT BE APPLIED UNLESS INVOICE IS PAID?
NTE** IN FULL BY THE DISCOUNT DUE DATE.?
NTE**-----?
REF*DP*00547?
REF*BC*CONTRACT42?
REF*BT*000001?

F1=Help  F3=Exit  F6=Next  F7=Bkwd  F8=Fwd  F12=Cancel

```

### Actions

- 6=Excp** Enter **6** for the current exception and press **Enter** to return to the Exception Detail screen.
- 7=MsgList** Enter **7** and press **Enter** to display the Exception Message List for the current exception. The Exception Message List screen will begin with the message currently displayed at the top of the Data Display.
- If messages are not displayed on the current screen when this action is requested, the Exception Message List screen begins its display from the previous message, or the first message found in the data.
- 8=UserMsg** Enter **8** and press **Enter** to display the User Message screen for an exception. You may associate a user message with the exception from the Capture Definition that captured the exception.
- For more information, refer to "User Messages" in Chapter 2, "Optional Features".

- 9=UserProc** Enter **9** and press **Enter** to display the User Procedure screen for an exception. You may associate a user procedure with the exception from the Capture Definition that captured the exception.  
Refer to "User Procedures" in Chapter 2, "Optional Features," for details regarding the use of User Procedures.
- 10=ExcpHist** Enter **10** and press **Enter** to display the Exception History screen for the current exception.

### Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F6=Next** Skip to the next block of data that has an associated message. This function key allows you to quickly scan through the messages issued for an exception within the context of the data for the exception.
- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

#### (Action)

A 1- to 2-character field entered by the user to request an action for the exception. Refer to **Actions** above for details regarding the available actions for this screen.

#### System

The system which was processing the exception when it was captured by Sterling Gentran:Viewpoint is displayed in this field.

#### Process

The process which was processing the exception when it was captured by Sterling Gentran:Viewpoint is displayed in this field.

#### Desc.

The description from the Exception Capture definition which is responsible for capturing the exception is displayed in this field.

#### Reference

Displays the reference identification of the exception.

For EDI exceptions, the reference is the Envelope Reference IDs.

For application exceptions, the reference is defined in mapping.

**Exception Data**

All of the data for the specified exception, with all of the tracking point and user messages inserted into the data, is displayed. Messages inserted in the data are marked with an asterisk (for example, \*msg).

## EDIM652 – Exception History Screen

### Purpose

The Exception History screen allows you to maintain and view a history of all activities performed against an exception since the exception was captured.

Exception History is comprised of two screens. The first screen provides the exceptions current status and note for the exception. By scrolling forward (**F8=Fwd**), the second screen provides previous statuses for the exception.

```

EDIM652 _____ EXCEPTION HISTORY 06/01/2011
Type Action, Press Enter.
_ 6=Excp 7=Data 8=MsgList 9=HistUpdt

Reference . . . : 000000003 /000000003
Current Status : CLOSED
Date-Time . . . : 06/01/2011 - 12:00

Status . . . . . : CLOSED
Update Initials: VPT TUTORIAL
Date-Time . . . : 06/01/2011 - 12:00
Recipient . . . :

Note . . . . . : CUSTOMER HAS LOST THE ACKNOWLEDGEMENT BUT ACCEPTED THE
PURCHASE ORDER.

F1=Help F3=Exit F6=Next F8=Fwd F12=Cancel

```

### Actions

- 6=Excp** Enter **6** and press **Enter** to return to the Exception Detail screen for the current exception.
- 7=Data** Enter **7** and press **Enter** to display the data for the exception. For exceptions captured from the Sterling Gentran translation system, the Exception Data Display screen displays the data for the exception. For exceptions captured from the Sterling Connect communications system, the Sterling Gentran:Plus Interchange Detail screen (EDIM402) displays the data for the exception.
- 8=MsgList** Enter **8** in the Action field to display the Exception Message List screen for the current exception.
- 9=HistUpdt** Enter **9** and press **Enter** to display the Exception History Update screen for the specified exception. The Exception History Update screen allows the user to update the status and enter a note for the exception.

### Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

---

<b>F3=Exit</b>	Returns to the previous menu.
<b>F6=Next</b>	Retrieve exception history information for the next exception of the current recipient. You may quickly scan through history information for all current exceptions for the recipient.
<b>F8=Fwd</b>	Scroll forward through the list, which is displayed on Exception History Screen – 2.
<b>F12=Cancel</b>	Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1-character field entered by the user to request an action for the exception. Refer to **Actions** above for details regarding the available actions for this screen.

### Reference

Displays the reference identification of the exception

For EDI exceptions, the reference is the Envelope Reference IDs.

For application exceptions, the reference is defined in mapping.

For communications exceptions, the reference is the Batch ID.

### Current Status

Displays the current status for the exception

### Date-Time

Displays the date (MM/DD/YYYY) and time (HH:MM) the status was assigned to the exception

### Status

Displays the current status for the exception of this history entry

<b>Open</b>	The entry is currently open.
<b>Review</b>	The entry is in review.
<b>Transfer</b>	The entry has been transferred.
<b>Closed</b>	The entry is closed.

### Update Initials

Displays the initials and surname of the user who made this history entry

### Date-Time

Displays the date (MM/DD/YYYY) and time (HH:MM) this history entry was made

**Recipient**

Displays the recipient ID and description of the recipient to whom the exception was transferred

This field is displayed for a history entry that has a status of Transfer.

**Note**

Information that was entered for this history entry is displayed in this area.

## EDIM653 – Exception History Screen – 2

### Purpose

The Exception History screen – 2 allows you to view a history of all previous statuses performed against an exception since the exception was captured.

The second screen of Exception History provides the exceptions previous statuses and notes.

```

EDIM653 _____ EXCEPTION HISTORY 06/01/2011
Type Action, Press Enter.
_ 6=Excp 7=Data 8=MsgList 9=HistUpdt

Status . . . . : REVIEW                      Date-Time: 06/01/2011 - 12:00
Update Initials: VPT TUTORIAL
Recipient . . . :
Note . . . . . : CALLED JOHN SMITH TO REPORT OVERDUE ACKNOWLEDGEMENT.

Status . . . . :                               Date-Time: -
Update Initials:
Recipient . . . :
Note . . . . . :

LAST ENTRY DISPLAYED
F1=Help F3=Exit F6=Next F7=Bkwd F8=Fwd F12=Cancel

```

### Actions

- 6=Excp**      Enter **6** and press **Enter** to return to the Exception Detail screen for the current exception.
- 7=Data**      Enter **7** and press **Enter** to display the data for the exception. For exceptions captured from the Sterling Gentran translation system, the Exception Data Display screen displays the data for the exception. For exceptions captured from the Sterling Connect communications system, the Sterling Gentran:Plus Interchange Detail screen (EDIM402) displays the data for the exception.
- 8=MsgList**    Enter **8** and press **Enter** to display the Exception Message List for the current exception.
- 9=HistUpdt**    Enter **9** and press **Enter** to display the Exception History Update screen for the specified exception. The Exception History Update screen allows you to update the status and enter a note for the exception.

### Function Keys

- F1=Help**      If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit**      Returns to the previous menu.
- F6=Next**      Returns to the Exception History Screen (EDIM652) to retrieve exception history information for the next exception, which belongs to the current recipient. A user



- may quickly scan through history information, for all current exceptions, for the recipient.
- F7=Bkwd** Scroll backward through the list on the current screen. When the most recent history entry is encountered, the Exception History Screen (EDIM652) is re-displayed.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1-character field entered by the user to request an action for the exception. Refer to **Actions** above for details regarding the available actions for this screen.

### Status

Displays the status for this history entry

<b>Open</b>	The entry was open.
<b>Review</b>	The entry was in review.
<b>Transfer</b>	The entry was transferred.
<b>Closed</b>	The entry was closed.

### Date-Time

Displays the date (MM/DD/YYYY) and time (HH:MM) the status was assigned to the exception

### Update Initials

Displays the initials and surname of the user who made this history entry

### Recipient

Displays the recipient ID and description of the recipient to whom the exception was transferred

This field is displayed for a history entry that has a status of Transfer.

### Note

Information that was entered for this history entry is displayed in this area.

## EDIM654 – Exception History Update Screen

### Purpose

The Exception History Update screen provides you with the ability to update the history for an exception.

From this screen you may update the status for an exception to **review**, **transfer**, or **close**. You may also enter a note along with the history entry.

```

EDIM654 _____ EXCEPTION HISTORY UPDATE 06/01/2011
Type Action, Press Enter.
_ 2=Update

Reference . . . : 000000003 /000000003
Current Status : OPEN
Date-Time . . . : 06/01/2011 - 12:00

Status . . . . . R (C=Close, R=Review, T=Transfer)
Update Initials: VPT TUTORIAL
Date-Time . . . : 06/01/2011 - 12:00
Recipient . . . : _____ (F4=PROMPT)
Description . . : _____

Note . . . . . CALLED_JOHN_SMITH_TO_REPORT_OVERDUE_ACKNOWLEDGEMENT. _____
_____
_____
_____

UPDATE COMPLETE
F1=Help F3=Exit F4=Prompt F12=Cancel

```

### Actions

**2=Update** Enter **2** in the Action field and press **Enter** to update the current history information. The exception history is updated in Sterling Gentran:Viewpoint using the current screen field values. When the action is complete, the screen is re-displayed with a message indicating that the entry has been updated.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F4=Prompt** Displays a selection list of values available for the field on which the cursor is currently located. The prompt function is only available on fields marked with **F4=PROMPT**.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1-character field entered by the user to request a required action for an exception. Refer to **Actions** above for details regarding the available action for this screen.

### Reference

Displays a reference which identifies the exception

For EDI exceptions, the reference is the Envelope Reference ID.

For application exceptions, the reference is the User Reference defined in mapping or the value the User Application tracking point has passed to Sterling Gentran:Viewpoint as the User Reference.

For communications exceptions, the reference is the Batch ID.

### Current Status

Displays the current status for the exception

### Date-Time

Displays the date (MM/DD/YYYY) and time (HH:MM) the status was assigned to the exception

### Status

A 1-character field entered by the user to specify the status of the exception.

<b>C</b>	Close the current exception.
<b>R</b>	Review the current exception.
<b>T</b>	Transfer the current exception.

### Update Initials

Displays the initials and surname of the user who is updating the history for the exception

### Date-Time

Displays the date (MM/DD/YYYY) and time (HH:MM) the history entry was made for the exception

### Recipient

A 1- to 10-character field entered by the user to specify the recipient to whom the user wants the exception transferred. Valid only if the status being entered is **T** (Transfer). From this field, you may use **F4=Prompt** to obtain a list of available recipients.

### Description

The description for the selected recipient.

### Note

Five (5) lines of free form text entered by the user to save information along with this history entry.

## EDIM662 – User Message Display Screen

### Purpose

The User Message Display screen allows you to retrieve an explanation for the exception. Create the User Message in Exception Management in the User Message Definition screen and then specify the User Message in the Capture Definition.

For more details regarding User Messages, refer to the "EDIM628 – User Message Definition Screen" in this Chapter. Also, refer to Chapter 3, "Tutorial".

```

EDIM662 _____ USER MESSAGE DISPLAY 06/01/2011
Type Action, Press Enter.
  __ 6=Excp 7=MsgList 8=Data 9=UserProc 10=ExcpHist

Reference : 000000003 /000000003
Excp Tag  : 0000000010
Description: CAPTURE ACKNOWLEDGEMENTS NOT ACCEPTED

Message
  U-999999 ACKNOWLEDGEMENT FROM PARTNER VENDOR-2 FOR PURCHASE ORDER IS
  OVERDUE.

Explanation
  VENDOR-2 HAS BEEN SET UP AS A JUST-IN-TIME SUPPLIER. ANY DELAY IN THEIR
  DELIVERIES MUST BE RESPONDED TO IMMEDIATELY. SEE USER PROCEDURE @JIT.

F1=Help F3=Exit F12=Cancel

```

### Actions

- 6=Excp** Enter **6** and press **Enter** to display the Exception Detail screen for the current exception.
- 7=MsgList** Enter **7** and press **Enter** to display the Exception Message List for the current exception.
- 8=Data** Enter **8** and press **Enter** to display the data for the exception. For exceptions captured from the Sterling Gentran translation system, the Exception Data Display screen displays the data for the exception. For exceptions captured from the Sterling Connect communications system, the Sterling Gentran:Plus Interchange Detail screen (EDIM402) displays the data for the exception.
- 9=UserProc** Enter **9** and press **Enter** to display the User Procedure screen. A User Procedure may have been associated with this exception in the Exception Capture Definition which captured this exception.  
  
For more information on User Procedures, refer to "User Procedures" in Chapter 2, "Optional Features".
- 10=ExcpHist** Enter **10** and press **Enter** to display the Exception History screen for the current exception.

## Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F12=Cancel** Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1- to 2-character field entered by the user to request an action. Refer to **Actions** above for details regarding the available actions for this screen.

### Reference

Displays the reference identification of the exception.

For EDI exceptions, the reference is the Envelope Reference IDs.

For application exceptions, the reference is defined in mapping.

For communication exceptions, the reference is the Batch ID.

### Excp Tag

Displays the exception tag assigned to the exception by Sterling Gentran:Viewpoint

### Description

Displays the description of the exception capture definition which captured this exception

### Message

Displays the user message

### Explanation

Displays the explanation for the message

## EDIM663 – User Procedure Display Screen

### Purpose

The User Procedure Display screen allows you to retrieve procedure instructions which can be used in the resolution of the exception. Create the User Procedure in Exception Management in the “User Procedure Definition” screen and then specify that User Procedure in the Capture Definition.

For more details regarding the use of User Procedures refer to the "EDIM630 – User Procedure Definition Screen" in this Chapter. Also, refer to Chapter 3, "Tutorial".

```

EDIM663 _____ USER PROCEDURE DISPLAY 06/01/2011
Type Action, Press Enter.
  _ 6=Excp 7=MsgList 8=Data 9=UserMsg 10=ExcpHist

Procedure : @MODEL-JIT
Description: PROCEDURE FOR HANDLING JUST-IN-TIME SUPPLIERS

Procedure
  1. INFORM PURCHASING.
  2. CALL SUPPLIER.
  3. IDENTIFY PO EXCEPTION.
  4. UPDATE MRP FOR IMPACT.

F1=Help F3=Exit F12=Cancel

```

### Actions

- 6=Excp**      Enter **6** and press **Enter** to display the Exception Detail screen for the current exception.
- 7=MsgList**    Enter **7** and press **Enter** to display the Exception Message List for the current exception.
- 8=Data**        Enter **8** and press **Enter** to display the data for the exception. For exceptions captured from the Sterling Gentran translation system, the Exception Data Display screen displays the data for the exception. For exceptions captured from the Sterling Connect communications system, the Sterling Gentran:Plus Interchange Detail screen (EDIM402) displays the data for the exception.
- 9=UserMsg**     Enter **9** and press **Enter** to display the User Message Display screen. A User Message may have been associated with this exception in the Exception Capture Definition which captured this exception.  
  
For more information on User Messages, refer to "User Messages" in Chapter 2, "Optional Features".

**10=ExcpHist** Enter **10** and press **Enter** to display the Exception History screen for the current exception.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F12=Cancel** Back up in the dialog, one screen at a time.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

#### (Action)

A 1- to 2-character field entered by the user to request an action. Refer to **Actions** above for details regarding the available actions for this screen.

#### Procedure

Displays the name of the procedure

#### Description

Displays the description of the procedure

#### Procedure

Displays the thirteen (13) line free form text procedure

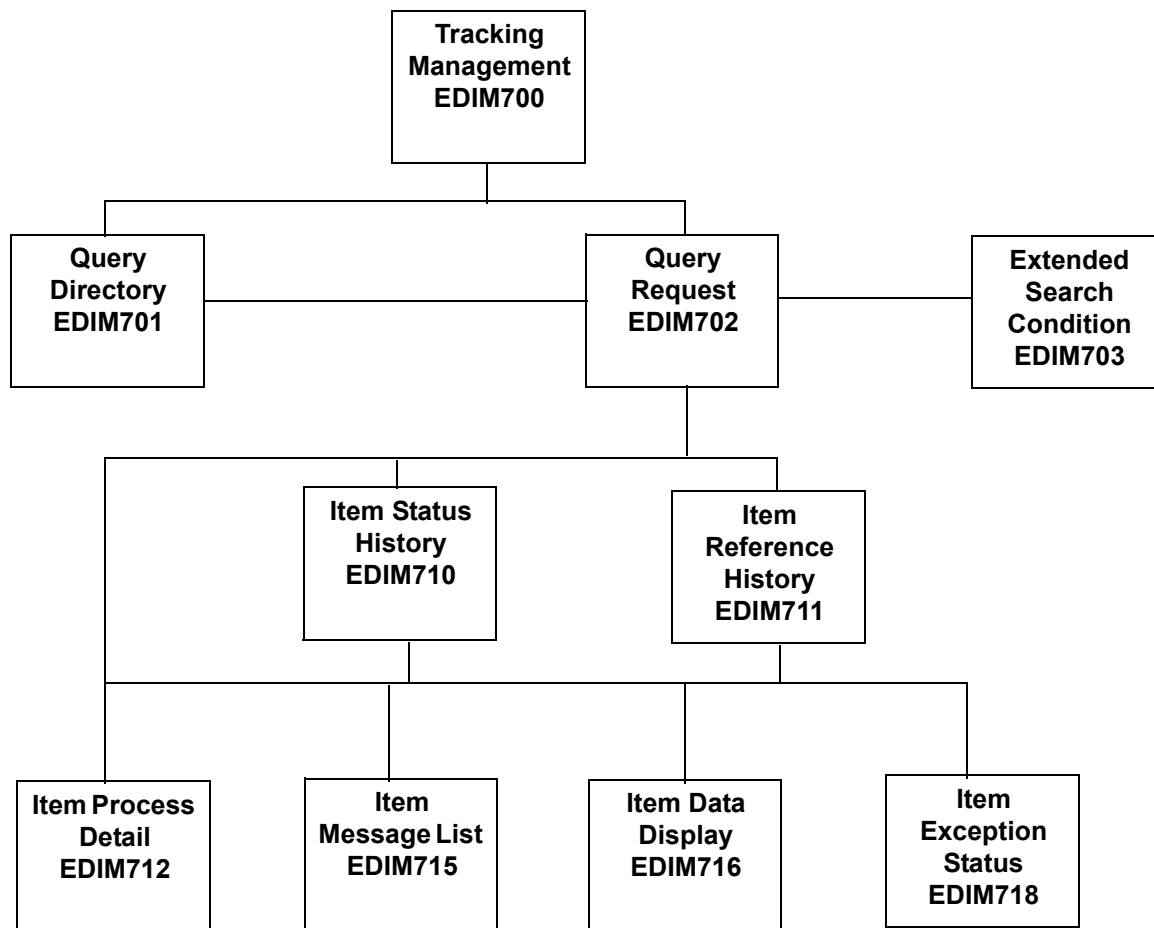
## Tracking Management Screens

### Tracking Management Navigation

For Tracking Management installations, the Tracking Management screens are available with the Sterling Gentran:Viewpoint system.

This section contains detailed information on the Tracking Management Screens. Tracking Management provides you with Query functions to search for an item within the extended EDI environment. The purpose of each screen and how to use their fields are described in detail in this section.

The navigation for Tracking Management is illustrated in Figure 5.5.



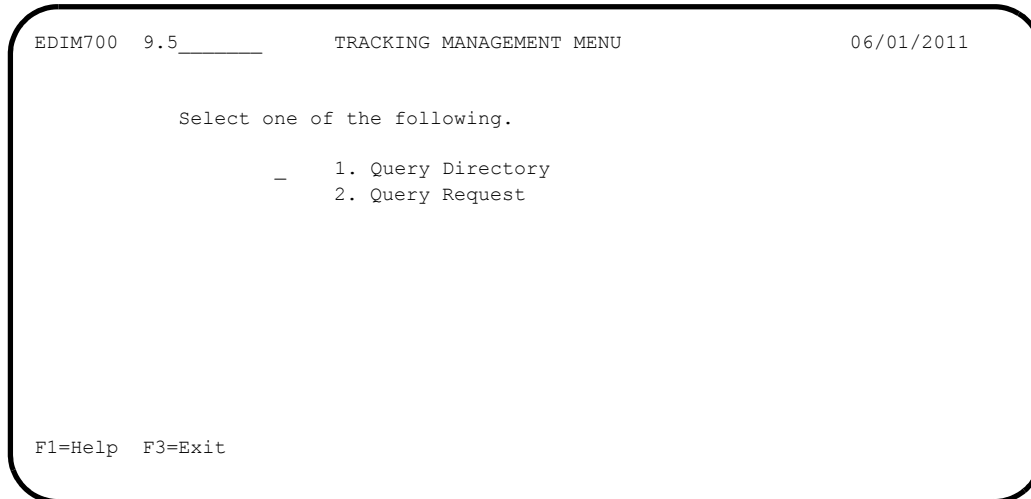
**Figure 5.5 Tracking Management Navigation**



## EDIM700 – Tracking Management Menu

### Purpose

The Tracking Management Menu provides you with direct access to the functions of Tracking Management. The typical users of the Tracking Management functions are the Sterling Gentran:Viewpoint Administrator, EDI Coordinator, or Business Users.



The Tracking Management Menu contains two options, which are listed below. The list of menu options, as well as a brief description of each option, follows.

Menu Option	Description
1. Query Directory	Provides a list of Query IDs that have been defined to Sterling Gentran:Viewpoint.
2. Query Request	Used to define a Query ID and perform the search function.



- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### Query ID

A 1- to 10-character field entered by the user. Control the entry displayed at the top of the list by entering the Query ID required. Partial names may be entered.

### Item Type

A 1- to 16-character field entered by the user. Item Type is used to identify the classification of data that is being listed.

- |                         |  |
|-------------------------|--|
| <b>ALL</b>              | All item types will be eligible for selection during the search.   |
| <b>Batch*</b>           | <ul style="list-style-type: none"><li>• Sterling Connect Offline Utilities</li><li>• Sterling Connect Communications product</li><li>• Sterling Connect Inbound Interface</li><li>• Sterling Connect Outbound Interface</li></ul> *(Sterling Gentrans:Plus users only) |
| <b>Document</b>         | <ul style="list-style-type: none"><li>• Inbound Mapper</li><li>• Outbound Mapper</li><li>• Inbound Application Databank Extract</li></ul>  |
| <b>Functional Group</b> | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgment Reconciliation/Monitor</li></ul>   |
| <b>Interchange</b>      | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgment Reconciliation/Monitor</li><li>• Network Reconciliation</li></ul>  |
| <b>Transaction</b>      | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgment Reconciliation/Monitor</li></ul>   |

**U:[type]** Any 1- to 16-character value the user determines for classifying different data types that they wish to monitor using Sterling Gentran:Viewpoint. These user item types are defined in the User Tracking Points that have been created in Extended System Management.

**A (Action)**

A 1-character field entered by the user to request an action for the Query ID. Refer to **Actions** above for details regarding available actions for this screen.

**Query ID**

The Query ID name is displayed in this column.

**Item Type**

The Item Type is displayed in this column.

**Description**

A description of the Query ID is displayed in this column.

**Note:** A query ID that has been marked for deletion displays the description “ENTRY HAS BEEN MARKED FOR DELETION”.

## EDIM702 – Query Request Screen

### Purpose

The Query Request allows you to search their entire extended EDI environment for items using basic search fields. A list of the items which satisfy the search fields is displayed. If the Search Fields provided on the Query Request screen do not meet your requirements, then you may select the Extended Search Condition screen to further qualify your query. This extended search condition is used with the Query Request.

```

EDIM702 9.5.2 _____ QUERY REQUEST 06/01/2011
Type Action, press Enter
_ 1=Add 2=Update 4=Delete 6=Search 7=ExtCond 8=ItemHist 9=ItemDt1
 13=ItemRefs

Query ID @INVOICEQY (F4=Prompt) Extended Condition used: NO
Description SAMPLE_INBOUND_INVOICE_HISTORY_QUERY_____

Search Fields Search limit 010000 Find limit 000100
Item Type U:INVOICE_____ (F4=Prompt)
Reference _____
Partner _____
Date From 06/01/2011 To 06/01/2011

A Item Type Reference Process
__ U:INVOICE INV01 VPIBAPPL
__
__
__
__
__

F1=Help F3=Exit F4=Prompt F7=Bkwd F8=Fwd F12=Cancel

```

### Actions

- 1=Add** Enter **1** and press **Enter** to add a query. If an Extended Condition has been entered for the query it will be saved with the query. A confirmation message will be issued before this action is performed.
- 2=Update** Enter **2** and press **Enter** to update a Query ID. The Query ID is updated using the current Search Fields and the Extended Search Condition, if used. The Query ID must already exist for this action to be valid. If this is a new Query ID, you should use the **Add** action. A confirmation message is issued for this action.
- 4=Delete** Enter **4** and press **Enter** to mark a Query ID for deletion. The Query ID is marked for deletion, and will be deleted during the next run of Sterling Gentran:Viewpoint Profiles Maintenance.

A Query ID can be restored from the archive file after maintenance has deleted it from the file. For more information on Profiles Maintenance, refer to “File Maintenance Procedures” in Chapter 2, “Operational Procedures”.

**Note:** A Query ID that has been marked for deletion, may not be updated from the Online Facility.

**6=Search** Enter **6** and press **Enter** to request that Sterling Gentran:Viewpoint start searching for items matching the search fields you have entered.

The Search function tries to find all items in your entire extended EDI environment that satisfy the search field values. If an extended search condition has been entered, the items must also match the extended condition.

Enter **6** and press **Enter** to further reduce the current list by changing the search fields and Extended Condition.

**7=ExtCond** Enter **7** and press **Enter** to display the Extended Search Condition screen. From this screen, you may add to your search criteria specified on the Query Request screen.

You should use this screen when the Query Request screen search fields are not sufficient for specifying your query condition.

The Extended Search Condition is saved, updated, and deleted with the Query Request it is associated with.

The following actions are only valid for the Action column beside the item list.

**8=ItemHist** Enter **8** on the line of the item to be selected and press **Enter** to display the Item Status History screen for the item. Processes are listed in chronological order.

**9=ItemDtl** Enter **9** on the line of the item to be selected and press **Enter** to display the Item Process Detail screen for the item.

**13=ItemRefs** Enter **13** on the line of the item to be selected and press **Enter** to display the Item Reference History screen for the item. This screen provides a list of all references associated with the item, based on the processes that processed the item.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F4=Prompt** Displays a selection list of values available for the field on which the cursor is currently located. The prompt function is only available on fields marked with **F4=Prompt**.

**F7=Bkwd** Scroll backward through the list on the current screen.

**F8=Fwd** Scroll forward through the list on the current screen.

**F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object. If changes have been made then a confirmation message is issued.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

**(Action)**

A 1-character field where you may enter actions that apply to the entire Query Request. Actions that apply to individual items in the list must be entered beside the item in the list's A(action) column.

The actions that may be entered in the screen-level Action field are:

1	=	Add
2	=	Update
4	=	Delete
6	=	Search
7	=	ExtCond

**Query ID**

A 1- to 10-character field entered by the user. Use of this field is optional. If you simply wish to perform a one-time search for an item, you do not need to use this field.

The **F4=Prompt** function may be used when the cursor is on this field. With the cursor on the Query ID field, press **F4=Prompt** to view the available Queries on the selection list.

You can retrieve a Query ID in one of these ways:

- When using the **F4=Prompt** function, type the number of the Query you want to view, and press **Enter**.
- Type the Query ID in this field, and press **Enter**.

**Extended Condition used:**

This is an informational field only, used to indicate whether or not the search criteria includes an extended search condition.

<b>Yes</b>	An Extended Search Condition has been entered for this Query. Type a <b>7</b> in the Action field to view the extended search condition.
<b>No</b>	An Extended Search Condition has not been entered for this Query. If additional search conditions are required, type a <b>7</b> in the Action field to add an extended search condition.

**Description**

A 1- to 45-character field entered by the user to describe the Query ID.

**Search Limit**

Specifies the maximum number of items the search action will evaluate for items matching the search criteria.

When this screen is displayed initially, the value defined in the Sterling Gentran:Viewpoint configuration record is displayed. When the number of items that match the search criteria exceeds the specified value, the message "SEARCH LIMIT ENCOUNTERED" is displayed. You can increase the value and enter an action 6 to perform the search again. Note that a large value in this field slows down response time.

**Find Limit**

Limits the number of items that satisfy the search criteria that will be displayed.

When this screen is displayed initially, the value defined in the Sterling Gentran:Viewpoint configuration record is displayed. When the number of items that match the search criteria exceeds the specified value, the message "FIND LIMIT ENCOUNTERED" is displayed. You can increase the value and enter an action 6 to perform the search again. Note that a large value in this field slows down response time.

## Search Fields

Enter search fields as the criteria you wish use to find items in the extended EDI environment. This means that for an item to be listed, the item must satisfy all of the search fields specified. If an Extended Search Condition has been entered, the item must also match the extended condition.

### Item Type

A 1- to 16-character field that you **must** enter. Item Type is used to identify the classification of data for which you are searching.

The **F4=Prompt** function may be used to display a list of valid item types. The item type is attached to the item by the Tracking Point (process) that passed the item to Sterling Gentran:Viewpoint. Item types are established in the Tracking Point Definitions.

For more information on “EDIM603 – Sterling Tracking Point Definition Screen” and “EDIM611 – User Tracking Point Definition Screen” descriptions, refer to this Chapter.

Valid item types are:

<b>ALL</b>	All item types will be eligible for selection during the search.
<b>Batch*</b>	<ul style="list-style-type: none"> <li>• Sterling Connect Offline Utilities</li> <li>• Sterling Connect Communications product</li> <li>• Sterling Connect Inbound Interface</li> <li>• Sterling Connect Outbound Interface</li> </ul> *(Sterling Gentran:Plus users only)
<b>Document</b>	<ul style="list-style-type: none"> <li>• Inbound Mapper</li> <li>• Outbound Mapper</li> <li>• Inbound Application Databank Extract</li> </ul>
<b>Functional Group</b>	<ul style="list-style-type: none"> <li>• Inbound Editor</li> <li>• Outbound Editor</li> <li>• Outbound EDI Databank Extract</li> <li>• Acknowledgment Reconciliation/Monitor</li> </ul>
<b>Interchange</b>	<ul style="list-style-type: none"> <li>• Inbound Editor</li> <li>• Outbound Editor</li> <li>• Outbound EDI Databank Extract</li> <li>• Acknowledgment Reconciliation/Monitor</li> <li>• Network Reconciliation</li> </ul>
<b>Transaction</b>	<ul style="list-style-type: none"> <li>• Inbound Editor</li> <li>• Outbound Editor</li> <li>• Outbound EDI Databank Extract</li> <li>• Acknowledgment Reconciliation/Monitor</li> </ul>



**U:[type]** Any 1- to 16-character value you determine for classifying different data types you wish to monitor using Sterling Gentran:Viewpoint. These user item types are defined in the User Tracking Points created in Extended System Management.

The information for each of the following fields is entered by the user:

### Reference

A 1- to 45-character field used to identify an item based on the item type.

#### Examples:

In mapping, the item type is Document and a document is identified by the User Reference defined by the mapping process.

**For Sterling Connect Items** in communications, the item type is Batch and a batch is identified by the assigned Batch ID.

A user application refers to its items using the assigned User Item Type and the 1- to 45-character user reference assigned by the user application.

### Partner

A 1- to 35-character ID used to find items that have the same Trading Profile Partner ID.

For Sterling Gentran Items this ID was defined in Sterling Gentran Partner maintenance and is attached to the item during translation. Based on the Trading Profile mode defined in Sterling Gentran, this field may be a 1- to 15- character field (Relationship mode) or a 1- to 35-character field (Partner Qualifier mode).

For Sterling Connect Items, the trading partner is identified by the Remote ID/Mailbox ID. The Remote ID was defined in the Sterling Gentran:Plus Communications Profile Maintenance subsystem. (Sterling Gentran:Plus users only)

For User Items, this value was passed by the user application to Sterling Gentran:Viewpoint in the Partner Field of the User Gateway.

### Date

An 8-character field to restrict the items that are found to be within a specific date range.

**From** Specifies the start of the date range in the format MM/DD/YYYY.

**To** Specifies the end of the date range in the format MM/DD/YYYY.

## Display List

All items that match the search criteria, specified in both the search fields and the extended search condition, are displayed in this list. From this list a number of actions may be performed against the individual items.

### A (Action)

A 1- to 2-character field where you may enter actions that apply to individual items. You must enter actions that apply to the entire Query in the screen level action field in the top left corner of the screen.

The actions that may be entered in the item-level Action field are:

8	=	ItemHist
9	=	ItemDtl
13	=	ItemRef

### Item Type

A 1- to 16-character field that identifies the classification of data that was found. The item type is attached to the item by the Tracking Point (process) that passed the item to Sterling Gentran:Viewpoint.

Valid item types are:

**Batch\***

- Sterling Connect Offline Utilities
- Sterling Connect Communications Product
- Sterling Connect Inbound Interface
- Sterling Connect Outbound Interface

\*(Sterling Gentran:Plus users only)

**Document**

- Inbound Mapper
- Outbound Mapper
- Inbound Application Databank Extract

**Functional Group**

- Inbound Editor
- Outbound Editor
- Outbound EDI Databank Extract
- Acknowledgment Reconciliation/Monitor

**Interchange**

- Inbound Editor
- Outbound Editor
- Outbound EDI Databank Extract
- Acknowledgment Reconciliation/Monitor
- Network Reconciliation

**Transaction**

- Inbound Editor
- Outbound Editor
- Outbound EDI Databank Extract
- Acknowledgment Reconciliation/Monitor

**U:[type]** Any 1- to 16-character value you determine for classifying different data types you wish to monitor using Sterling Gentran:Viewpoint. These user item types are defined in the User Tracking Points that have been created in Extended System Management.

### Reference

A 1- to 45-character field displayed to identify the item. The Reference is used to identify an item based on the item type or how a process uniquely identifies the item.

#### Examples:

In mapping, the item type is a Document and a document is identified by the User Reference that is defined by the map process.

**For Sterling Connect Items** in communications, the item type is Batch and a batch is identified by the assigned Batch ID.

A user application would refer to items using the assigned User Item Type and the 1- to 45-character user reference assigned by the user application.

**Process**

A 1- to 8-character field name of the process which passed the item to Sterling  
Gentran:Viewpoint.

## EDIM703 – Extended Search Condition Screen

### Purpose

The Extended Search Condition may be used to further qualify a query request. The Extended Search Condition is used when the Search Fields provided on the Query Request screen are insufficient for searching the items.

For example, Partner=ABC is specified in the Search Fields on the Query Request and Application=PURCHASING is specified in the extended condition. Since the Application field cannot be specified on the Query Request screen, Search will evaluate this condition as follows:

PARTNER=ABC AND APPLICATION=PURCHASING

```

EDIM703 _____ EXTENDED SEARCH CONDITION 06/01/2011
Type Action, press Enter
  6=Search 14=Query

Query ID   : @INVOICEQY  SAMPLE INBOUND INVOICE HISTORY QUERY

Query Request Search Fields
Item Type: U:INVOICE
Reference:
Partner   :
Date From: 06/01/2011 To 06/01/2011

Extended Condition (F4=Prompt)
Field      Op  Value                                     Connector
APPLICATION DATA ID_____ EQ  INVFILE_____
_____   --  _____
_____   --  _____
_____   --  _____
_____   --  _____
_____   --  _____

F1=Help  F3=Exit  F4=Prompt  F12=Cancel

```

### Actions

**6=Search** Enter **6** in the Action field and press **Enter** to initiate a search using the extended search condition and all search fields that were entered on the Query Request screen.

The Query Request screen is displayed, listing all of the items that were found. The items found match the criteria from both the search fields on the Query Request screen and the Extended Search Conditions on this screen.

The Extended Search Conditions may be saved on the Query Request screen.

**14=Query** Enter **14** in the Action field and press **Enter** to return to the Query Request screen without initiating a search.

The Query Request screen is redisplayed with the original search fields and the original list of items found prior to entering the Extended Search Condition screen. You must initiate a search on the Query Request screen to find items which match both the search fields on the Query Request screen and the Extended Search Conditions entered on this screen.

The Extended Search Conditions may be saved on the Query Request screen.

## Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F4=Prompt** Displays a selection list of values available for the field on which the cursor is currently located. The prompt function is only available on fields marked with **F4=Prompt**.
- F12=Cancel** Back up in the dialog, one screen at a time. Update is not performed on the current object. If changes were made, a confirmation message is issued.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1- to 2-character field entered by the user where actions are provided with the Extended Search Condition function. Refer to **Actions** above for details regarding the available actions for this screen.

### Query ID

Displays the Query ID for which the extended search condition is used. This field will be blank if the Query ID was not entered or saved from the Query Request screen.

A blank Query ID implies that you only want to request this query once.

If you wish to use this query again, type the Query ID on the Query Request screen to add this Query to the Profiles file.

### (description)

Displays the description for the Query entered on the Query Request screen.

## Query Request Search Fields

### Item Type

Displays the Item Type entered on the Query Request screen.

### Reference

Displays the Reference entered on the Query Request screen.

### Partner

Displays the Partner entered on the Query Request screen. For Sterling Connect item types, the trading partner is identified by their Remote ID/Mailbox ID.

### Date

- From** Displays the start of the date range that was specified on the Query Request screen in the format:  
MM/DD/YYYY
- To** Displays the end of the date range that was specified on the Query Request screen in the format:  
MM/DD/YYYY

## Extended Condition

The Extended Condition allows you to extend your Query Request search fields when these search fields do not sufficiently identify the items for which you are searching.

The extended condition can be a 1- to 7-expression condition using full boolean logic and connectors of AND or OR. The **F4=Prompt** function can be used for the search condition. Refer to the "Extended Search Condition Reference Chart" for a complete list of all the fields and values that may be used.

The information for each of the following fields is entered by the user:

### Field

A 1- to 25-character field to specify the field to be used in the expression. The valid fields which can be entered vary by the Item Type specified. You may use function key **F4=Prompt** when the cursor is on this field to display a selection list of valid selection criteria for the Item Type specified.

### Op

A 2-character field used to specify the operator for the expression. Valid operators vary by field, as described in the Extended Search Condition Reference Chart.

<b>EQ</b>	Equal.
<b>NE</b>	Not Equal.
<b>GT</b>	Greater Than.
<b>LT</b>	Less Than.
<b>LE</b>	Less Than or Equal To.
<b>GE</b>	Greater Than or Equal To.

### Value

A 1- to 35-character field that specifies the value which should be used to test against the data value for the field. For valid values refer to the "Extended Search Condition Reference Chart".

### Connector

A 2- to 3-character field used to Sterling Connect multiple expressions for completing the desired selection criteria. The order of precedence is ANDs before ORs (that is, ANDs are evaluated, then ORs are evaluated, then the condition is tested for truth).

For example, A and B or C and D would be evaluated as:

(A and B) or (C and D).

<b>AND</b>	Both expressions must be true.
<b>OR</b>	Either one of the expressions must be true.

## Extended Search Condition Reference Chart

### Purpose

The Extended Search Condition Reference Chart provides you with a quick reference to the fields that may be used in an extended condition. The chart also provide the valid values, item types, and item direction that can be used with the fields.

### Structure

<b>Field</b>	This column is used to specify the field to be used in the expression. The valid fields which can be entered vary by the Item Type specified.
<b>Ops</b>	This column is used to specify valid operators that can be used with the field in an expression.
<b>Item Type</b>	This column specifies the item types to which the query field may apply. In cases where the field is valid for the item in only one direction, the direction is shown. This is shown as (in) for inbound only and (out) for outbound only. Item Type is based on the tracking points that are able to process the item(s) being searched for. The Item Type is defined in the Tracking Point Definition.
<b>Value</b>	This column specifies the value which should be used to compare against the data value for the field. Some values are valid in one direction only, as indicated in the value description. This is shown as (in) for inbound only and (out) for outbound only. When direction dependent queries are used in a search, items will only be searched if they match the direction associated with the value.

## Using the Extended Search Condition Reference Chart

1. Locate the desired field on the Extended Search Condition Reference Chart.
2. Confirm item type specified is valid for the field.
3. Choose from the valid values for the field.
4. Ensure that a valid operator value is being used.

Item Type Legend		
<b>any</b>	Any	All item types will be eligible during the search.
<b>B</b>	Batch	<ul style="list-style-type: none"> <li>• Sterling Connect Communications data (Sterling Gentran:Plus users only)</li> </ul>
<b>D</b>	Document	<ul style="list-style-type: none"> <li>• Mappers data</li> <li>• Inbound Application Extract data</li> </ul>
<b>F</b>	Functional Group	<ul style="list-style-type: none"> <li>• Editors data</li> <li>• Outbound EDI Extract data</li> <li>• Acknowledgment Reconciliation data</li> </ul>
<b>I</b>	Interchange	<ul style="list-style-type: none"> <li>• Editors data</li> <li>• Outbound EDI Extract data</li> <li>• Acknowledgment Reconciliation data</li> <li>• Network Reconciliation data</li> </ul>
<b>T</b>	Transaction	<ul style="list-style-type: none"> <li>• Editors data</li> <li>• Outbound EDI Extract data</li> <li>• Acknowledgment Reconciliation data</li> </ul>
<b>U</b>	U:[type]	<p>1- to 16-character value. The first 2 characters must be entered as "U:".</p> <p>User Item Types are user defined on User Tracking Points they have defined for systems other than Sterling Gentran and Sterling Connect. These tracking points are defined for user applications that are accessing Sterling Gentran:Viewpoint through the Sterling Gentran:Viewpoint user gateways.</p> <p>You may use the <b>F4=Prompt</b> function in the Item Type field on the Query Request to get a complete list of valid Item Types.</p>



## Extended Search Condition Reference Chart

Field	Item Type	Ops	Value
<b>The following conditions apply to Sterling Gentran and user item types</b>			
Acknowledg - ment Status	I, F, T, D(in)	EQ,NE	The current acknowledgment status for the item. <ul style="list-style-type: none"> <li>• A – Accepted</li> <li>• E – Accepted with Errors</li> <li>• I – Indeterminate (out)</li> <li>• O – Overdue (out)</li> <li>• P – Partial</li> <li>• R – Rejected</li> <li>• W – Waiting for Acknowledgment</li> </ul>
Application Data ID	D, T(out), U	EQ, NE	1- to 10-character value. <b>Sterling Gentran Item Types</b> Application Data ID used by Sterling Gentran for mapping the document. <b>User Item Types</b> The value that is passed through the gateway by the user application for identifying the user application.
Compliance Status	T(in)	any	The current compliance status for the item. <ul style="list-style-type: none"> <li>• 00 – No errors were encountered.</li> <li>• 04 – One or more errors were encountered.</li> <li>• 08 – One or more missing or misplaced segments were encountered.</li> <li>• 12 – The transaction set was incomplete.</li> </ul>
Databank System Ind	D, I, F, T	EQ, NE	The Databank System which processed the item. <ul style="list-style-type: none"> <li>• <b>G</b> – Sterling Gentran</li> <li>• <b>R</b> – Sterling Gentran:Realtime</li> </ul>
Deferred Enveloping	I, F, T	EQ, NE	1-character code. <ul style="list-style-type: none"> <li>• <b>Y</b> – Yes, is a deferred enveloping item.</li> <li>• <b>N</b> – No, is not a deferred enveloping item</li> </ul> <b>Sterling Gentran Item Types</b> This item is a deferred enveloping item on the databank.
Direction	any	EQ, NE	A 1-character field you enter to specify that the query should only search for items travelling in a certain direction. Direction should be thought of as being relative to traffic that moves through the Extended EDI System. That is, items coming to you from a partner are inbound and items you send to a partner are outbound. <ul style="list-style-type: none"> <li>• <b>I</b> Only search for inbound items.</li> <li>• <b>O</b> Only search for outbound items.</li> </ul>

Field	Item Type	Ops	Value
Division	any	EQ, NE	<p>1- to 3-character value for identifying the division the item belongs to.</p> <p><b>Note:</b> Only items belonging to a division to which your Sterling Gentran user ID has access are returned by the search function.</p> <p><b>Sterling Gentran Item Types</b> The division is resolved from the partner profile used to process the item.</p> <p><b>User Item Types</b> The value passed through the gateway by the user application for identifying the division to which the item belongs.</p>
Duplicate Indicator	D, I, F, T, U	EQ, NE	<p>1-character code.</p> <ul style="list-style-type: none"> <li>• Y – Yes is a duplicate.</li> <li>• N – No is not a duplicate.</li> </ul> <p><b>Sterling Gentran Item Types</b> This item is a duplicate of another item on the Databank.</p> <p><b>User Item Types</b> The value passed through the gateway by the user application for identifying that the item is a duplicate.</p>
Envelope Status	I, F, T, D(in)	any	<p>The status from Envelope Validation for the item.</p> <ul style="list-style-type: none"> <li>• 00 – No errors were encountered in the document.</li> <li>• 04 – One or more errors (other than authorization and sequence errors) were encountered in processing the Transmission Envelope, or one or more errors (other than unknown user or unknown partner) were encountered in processing the Functional Group Envelope.</li> <li>• 08 – Either no Partner ID/Qualifier or User/Partner was found corresponding to the sender/receiver codes contained in the Functional Group or the segment count contained in the Transaction Set Trailer was found to be in error.</li> </ul>
Functional Group ID	F, T	EQ, NE	<p>The functional group ID from the EDI data. 1- to 6-character value</p>
Mapping Status	D	any	<p>The current mapping status for the item.</p> <ul style="list-style-type: none"> <li>• 00 – No errors were encountered during the mapping process.</li> <li>• 04 – One or more non-fatal mapping errors were detected.</li> <li>• 12 – An outbound document could not be translated.</li> </ul>

Field	Item Type	Ops	Value
Network	I(out), U	EQ, NE	<p>1- to 15-character value.</p> <p><b>Sterling Gentran Item Types</b> The network ID from the trading profile used to process this item.</p> <p><b>User Item Types</b> The value passed through the gateway by the user application for identifying the network to which the item belongs.</p>
Network Status	I(out)	EQ, NE	<p>The current network status for the item. Must be running Network Reconciliation(EDID850) for this status to be available.</p> <ul style="list-style-type: none"> <li>• E – Error on receive, sorting, or pickup.</li> <li>• N – Network Tracking not active.</li> <li>• P – Picked up.</li> <li>• R – Received.</li> <li>• S – Sorted.</li> <li>• U – Manual network complete.</li> <li>• W – Waiting.</li> </ul>
Partner	D, I, F, T, U	EQ, NE	<p>Partner ID from the Trading Profile that processed this item.</p> <ul style="list-style-type: none"> <li>• 1- to 15-character value (If trading profile mode is Relationship or User/Partner.)</li> <li>• 1- to 35-character value (If trading profile mode is Partner-Qualifier.)</li> </ul> <p><b>Note:</b> This field may not be specified if already specified on the Query Request screen.</p>
Partner Qualifier	D, I, F, T, U	EQ, NE	<p>Partner Qualifier for the Partner (Only valid if trading profile mode is Partner-Qualifier.)</p> <p>1- to 4-character value.</p>

Field	Item Type	Ops	Value
Process	any	EQ, NE	<p>The process is defined as part of all tracking points defined in Sterling Gentran:Viewpoint.</p> <p>1- to 8-character value.</p> <p><b>Sterling Gentran processes</b></p> <ul style="list-style-type: none"> <li>• EBDI001 – Inbound Editor</li> <li>• EBDI002 – Outbound Editor</li> <li>• EBDI041 – Inbound Mapping</li> <li>• EBDI042 – Outbound Mapping</li> <li>• EDID205 – Outbound EDI Databank Extract</li> <li>• EDID255 – Sterling Gentran:Realtime Outbound EDI Databank Extract</li> <li>• EDID405 – Inbound Application Databank Extract</li> <li>• EDID455 – Sterling Gentran:Realtime Inbound Application Databank Extract</li> <li>• EDID510 – Acknowledgment Reconciliation/Monitor</li> <li>• EDID515 – Sterling Gentran:Realtime Acknowledgment Reconciliation/Monitor</li> <li>• EDID850 – Network Reconciliation</li> <li>• EDIR001 – Sterling Gentran:Realtime Inbound Editor</li> <li>• EDIR002 – Sterling Gentran:Realtime Outbound Editor</li> <li>• EDIR041 – Sterling Gentran:Realtime Inbound Mapper</li> <li>• EDIR042 – Sterling Gentran:Realtime Outbound Mapper</li> </ul> <p><b>User processes</b></p> <p>Any processes defined as User Tracking Points in Sterling Gentran:Viewpoint Extended System Management.</p>
Process Status 1	U	any	<p>A 1- to 10-character field passed to Sterling Gentran:Viewpoint for an item by a User tracking Point. The Process Status 1 field can be any value you wish to pass to Sterling Gentran:Viewpoint for the item. The name or label used for the Process Status 1 field is user assigned when defining the User Tracking Point in Extended System Management.</p> <p>For each process, two other Process Statuses may be passed for each item. The labels for these process statuses are defined in the same manner.</p>
Process Status 2	U	any	<p>A 1- to 10-character field passed to Sterling Gentran:Viewpoint for an item by a User tracking Point. The Process Status 2 field can be any value you wish to pass to Sterling Gentran:Viewpoint for the item. The name or label used for the Process Status 2 field is user assigned when defining the User Tracking Point in Extended System Management.</p> <p>For each process, two other Process Statuses may be passed for each item. The labels for these process statuses are defined in the same manner.</p>

Field	Item Type	Ops	Value
Process Status 3	U	any	A 1- to 10-character field passed to Sterling Gentran:Viewpoint for an item by a User tracking Point. The Process Status 3 field can be any value you wish to pass to Sterling Gentran:Viewpoint for the item. The name or label used for the Process Status 3 field is user assigned when defining the User Tracking Point in Extended System Management. For each process, two other Process Statuses may be passed for each item. The labels for these process statuses are defined in the same manner.
Processed Date	D, I, F, T, U	any	An 10-character value must be entered in the format MM/DD/YYYY. The date the item was processed by a Tracking Point. <b>Note:</b> This field may not be specified if already specified on the Query Request screen.
Processed Time	D, I, F, T, U	any	A 5-character value must be entered in the format HH:MM. The time the item was processed by a Tracking Point.
Reference	any	any	Displays the 1- to 45-character reference identification for an item based on the item type. For EDI items, the reference is the Envelope Reference ID. For Application items, the reference is defined in the mapping process. For User Application items, the reference is passed from the User Application with the item. <b>Note:</b> This field may not be specified if already specified on the Query Request screen.
Sequence Status	D(in), I, F, T	any	The status from Sequence Checking for the item. <ul style="list-style-type: none"> <li>• 00 – No errors.</li> <li>• 04 – Sequence errors detected.</li> </ul>
Set	D, F, I, T, U	EQ, NE	Set is a 1- to 6-character field you enter to request that a specific set of data for an item type be searched for. <b>Examples:</b> <ul style="list-style-type: none"> <li>• My item type is Transaction but I only want to search for 850s (purchase orders).</li> <li>• When my purchasing application passes item information to Sterling Gentran:Viewpoint for purchase orders it passed, the value of "10" in the "Set" field in the Gateway because this is how my purchasing users refer to purchase orders. They may now request "Set=10" when searching for all purchase orders for the application.</li> <li>• An example of a 6-character set is an EDIFACT Remittance Advice message – REMADV.</li> </ul>

Field	Item Type	Ops	Value
System	any	EQ, NE	1- to 10-character value. The system is defined as part of all tracking points defined in Sterling Gentran:Viewpoint. Valid systems are Sterling Gentran and any user system defined as a User Tracking Point.
System Message	D, I, F, T	any	The System Message ID generated for the item by the tracking point. 6-digit number (leading zeroes required)
Test/ Production	D, I, F, T, U	EQ, NE	The test/production indicator for the item. <ul style="list-style-type: none"> <li>• P – Production.</li> <li>• T – Test.</li> </ul>
Trace ID	any	any	A 10-character field that is a unique value for any and all items being tracked by Sterling Gentran:Viewpoint. The Trace ID is assigned to the item by Sterling Gentran:Viewpoint when the items status is first passed to Sterling Gentran:Viewpoint. The Trace ID is carried forward to each process that the item travels through. The Trace ID is used by Sterling Gentran:Viewpoint to track the complete history of an item. Format of the Trace ID is @@##### where @@ are the letters and ##### is an 8 digit number.
User Field 1	U	any	1- to 15-character field passed to Sterling Gentran:Viewpoint for an item by a User tracking Point. The User Field 1 can be any value the user wishes to pass to Sterling Gentran:Viewpoint for the item. The name or label used for the User Field 1 field is user assigned when defining the User Tracking Point in Extended System Management. For each process, two other User Fields may be passed for each item. Define the labels for these User Fields in the same manner.
User Field 2	U	any	A 1- to 15-character field passed to Sterling Gentran:Viewpoint for an item by a User tracking Point. The User Field 2 can be any value you wish to pass to Sterling Gentran:Viewpoint for the item. The name or label used for the User Field 2 field is user assigned when defining the User Tracking Point in Extended System Management. For each process, two other User Fields may be passed for each item. Define the labels for these User Fields in the same manner.

## EDIM703 – Extended Search Condition Screen

Field	Item Type	Ops	Value
User Field 3	U	any	A 1- to 15-character field passed to Sterling Gentran:Viewpoint for an item by a User tracking Point. The User Field 3 can be any value you wish to pass to Sterling Gentran:Viewpoint for the item. The name or label used for the User Field 3 field is user assigned when defining the User Tracking Point in Extended System Management. For each process, two other User Fields may be passed for each item. Define the labels for these User Fields in the same manner.
User	D, I, F, T U	EQ, NE	A 1- to 15-character value. <b>Sterling Gentran Item Types</b> The User ID assigned to the item from the trading profile used to process the item. (Only valid if Trading Profile mode is Relationship or User/Partner) <b>User Item Types</b> The value passed through the gateway by the user application for identifying the user to which the item belongs.
User Reference	T	any	1 – 45 character user reference identification for the transaction item type. This field is only valid for transaction item types.
User Error Number	D	any	The User Error Number generated for the item by the Tracking Point. 6-digit number (leading zeros required)
<b>The following extended conditions apply to Sterling Gentran processes (Sterling Gentran:Realtime users only)</b>			
CICS Task Number	D, I, F, T	any	The CICS Task Number which processed the item. 7-digit value
CICS Transaction ID	D, I, F, T	EQ, NE	The CICS Transaction ID which processed the item. 4-character value
Option	D, I, F, T	any	The Option number which processed the item. 3-digit value
Path ID	D, I, F, T	any	The Path ID which processed the item. 3-digit value
Queue File Number	D, I, F, T	any	The Queue File Number which contained the output data for the item. 3-digit value
<b>The following extended conditions apply to Sterling Connect item types (Sterling Gentran:Plus users only)</b>			

Field	Item Type	Ops	Value
Added Flag	B	EQ,NE	A 1-character indicator. Y – Yes, batch has been added offline. Indicates whether the batch has been added offline.
Batch ID	B	any	A 1- to 24-character identifier assigned to the communications batch. <b>Note:</b> This field may not be specified if already specified on the Query Request screen.
Batch Number	B	any	A 7-digit value assigned by Sterling Connect to the communications batch.
Collected Flag	B	EQ,NE	A 1-character indicator. Y – Yes, batch has been collected online. Indicates whether the batch has been collected online.
Communication Protocol	B	EQ,NE	A 1-character indicator. <ul style="list-style-type: none"> <li>• B – BSC originated batch.</li> <li>• S – SNA originated batch.</li> <li>• H – Host originated batch.</li> </ul> Indicates whether the batch originated from a BSC, SNA, or Host source.
Direction	B	EQ,NE	A 1-character field you enter to specify that the query should only search for items travelling in a certain direction. Direction should be thought of as being relative to traffic that moves through the Extended EDI System. That is, items coming to you from a partner are inbound and items you send to a partner are outbound. <ul style="list-style-type: none"> <li>• I – Only search for inbound items.</li> <li>• O – Only search for outbound items.</li> </ul>
Extracted Flag	B	EQ,NE	A 1-character indicator. Y – Yes, batch has been extracted. Indicates whether the batch has been extracted offline.
Failure Code	B	any	A 3-digit failure code associated with the batch.
Incomplete Flag	B	EQ,NE	A 1-character indicator. <ul style="list-style-type: none"> <li>• Y – Yes, batch is incomplete.</li> <li>• N – No, batch is complete.</li> </ul> Indicates whether the batch has been completely received.
Process	B	EQ,NE	A 1- to 8-character value. The process is defined as part of all tracking points that are defined in Sterling Gentran:Viewpoint. <ul style="list-style-type: none"> <li>• STOUTL – Sterling Connect Offline Utilities</li> <li>• MAILBOX – Sterling Connect Communications product</li> <li>• EDIR314 – Sterling Connect Outbound Interface</li> <li>• EDIR316 – Sterling Connect Inbound Interface</li> </ul>



## EDIM703 – Extended Search Condition Screen

Field	Item Type	Ops	Value
Processed Date	B	any	An 10-character value must be entered in the format MM/DD/YYYY. The date the item was processed by a Tracking Point. <b>Note:</b> This field may not be specified if already specified on the Query Request screen.
Processed Time	B	any	A 5-character value must be entered in the format HH:MM. The time the item was processed by a Tracking Point.
Record Count	B	any	A 9-digit value for the number of records in the batch.
Remote ID	B	any	A 1- to 8-character remote ID. <b>Note:</b> This field may not be specified if already specified on the Query Request screen.
Requestable Flag	B	EQ,NE	A 1-character indicator. <ul style="list-style-type: none"> <li>• Y – Yes, batch is available for requests.</li> <li>• N – No, batch is not available for requests.</li> </ul> Indicates whether the batch is available for system requests.
System	B	EQ,NE	A 1- to 10-character value. The system is defined as part of all tracking points that are defined in Sterling Gentran:Viewpoint. The valid system is Sterling Connect for communications batch items.
Trace ID	B	any	A 10-character field that is a unique value for any and all items being tracked by Sterling Gentran:Viewpoint. The Trace ID is assigned to the item by Sterling Gentran:Viewpoint when the items status is first passed to Sterling Gentran:Viewpoint. The Trace ID is carried forward to each process that the item travels through. The Trace ID is used by Sterling Gentran:Viewpoint to track the complete history for an item. Format of the Trace ID is @@##### where @@ are the letters and ##### is an 8-digit number.
Transmitted Flag	B	EQ,NE	A 1-character indicator. Y – Yes, batch has been transmitted. Indicates whether the batch has been transmitted.
<b>The following extended conditions apply to Sterling Connect processes (Sterling Gentran:Realtime users only)</b>			
CICS Task Number	B	any	The CICS Task Number which processed the item. 7-digit value
CICS Transaction ID	B	EQ, NE	The CICS Transaction ID which processed the item. 4-character value
Option	B	any	The Option number which processed the item. 3-digit value

Field	Item Type	Ops	Value
Path ID	B	any	The Path ID which processed the item. 3-digit value
Queue File Number	B	any	The Queue File Number which contained the output data for the item. 3-digit value

## EDIM710 – Item Status History Screen

### Purpose

The Item Status History screen lists all of the processes by which an item has been processed, as long as the process is defined to Sterling Gentran:Viewpoint as a tracking point and the tracking option is enabled for the tracking point. The status, date, and time of the process are listed with the item. Processes are listed in chronological order. If any exceptions are detected by Sterling Gentran:Viewpoint Exception Management, they are also listed.

```

EDIM710 _____ ITEM STATUS HISTORY 06/01/2011
Type Action, press Enter
 9=ItemDtl 10=MsgList 11=DataDisp 13=ItemRefs 15=Excps

Reference: INBOUND BATCH 4125
Process VPIBCOMM

A Item Process Description Status Date Time Excp
--- U VPIBCOMM SAMPLE INBOUND COMMUNICATION RECEIVED 06/01/2011 12:00 0000
--- I EBDI001 INBOUND EDITOR 06/01/2011 12:00 0000
--- F EBDI001 INBOUND EDITOR 06/01/2011 12:00 0000
--- T EBDI001 INBOUND EDITOR 04 06/01/2011 12:00 0001
--- D EBDI041 INBOUND MAPPER 04 06/01/2011 12:00 0001
--- U VPIBAPPL SAMPLE INBOUND INVOICE APPLI OK 06/01/2011 12:00 0000
---
---
---
---
---
---
F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel

```

### Actions

- 9=ItemDtl** Enter **9** on the line of the item to be selected, and press **Enter** to display the Item Process Detail screen for the item.
- 10=MsgList** Enter **10** on the line of the item to be selected, and press **Enter** to display the Item Message List screen. This screen lists all messages that were issued for the item.  
**For Sterling Gentran processes**, all messages issued by the process are listed.  
**For Sterling Connect processes**, the explanation text associated with a communications failure code is displayed.  
**For User processes**, only the messages that were passed to Sterling Gentran:Viewpoint for the item by the user application are displayed.
- 11=DataDisp** Enter **11** on the line of the item to be selected and press **Enter** to display the data for the item.  
For items originating from the Sterling Gentran translation system, the Item Data Display screen displays the data for the item. All messages for the item are inserted into the data in the appropriate places. To use this action, the Sterling Gentran Databank Message Store must be implemented.

---

For items originating from the Sterling Connect communications system, the Sterling Gentran:Plus Interchange Detail screen (EDIM402) displays the data for the item.

**13=ItemRefs** Enter **13** on the line of the item to be selected and press **Enter** to display the Item Reference History screen for the item. This screen provides a list of all references associated with the item, based on the processes that handled the item.

**15=Excps** Enter **15** on the line of the item to be selected and press **Enter** to display the Item Exception Status screen. This screen lists all recipients that captured the item in Sterling Gentran:Viewpoint Exception Management.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F7=Bkwd** Scroll backward through the list on the current screen.

**F8=Fwd** Scroll forward through the list on the current screen.

**F12=Cancel** Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### Reference

A 1- to 45-character field reference identification for the item, based on the item type.

For EDI items, the reference is the Envelope Reference IDs.

For application items, the reference is defined in the mapping process.

For communication items, the reference is the assigned Batch ID.

For user application items, the reference is passed from the User Application with the item.

### Process

A 1- to 8-character field entered by the user to control which process is positioned at the top of the list.

### A (Action)

A 1- to 2-character field entered by the user to request an action for an item. Refer to **Actions** above for details regarding the available actions for this screen.

### Item

A 1-character field which displays the Item type of the item.

<b>B</b>	Batch*	<ul style="list-style-type: none"><li>• Sterling Connect Offline Utilities</li><li>• Sterling Connect Communications product</li><li>• Sterling Connect Inbound Interface</li><li>• Sterling Connect Outbound Interface</li></ul> *(Sterling Gentran:Plus users only)
<b>D</b>	Document	<ul style="list-style-type: none"><li>• Inbound Mapper</li><li>• Outbound Mapper</li><li>• Inbound Application</li><li>• Databank Extract</li></ul>
<b>F</b>	Functional Group	<ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract Acknowledgement Reconciliation/Monitor</li></ul>
<b>I</b>	Interchange	<ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li><li>• Network Reconciliation</li></ul>
<b>T</b>	Transaction	<ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li></ul>
<b>U</b>	U:[type]	1- to 16-character value. User item types have been defined by the user on the User Tacking Point Definition screen.

### Process

A 1- to 8-character field that displays the process ID that processed the item at the date and time shown.

### Description

A 1- to 28-character field that displays the description of the process, as defined in the Tracking Point Definition.

### Status

A 1- to 10-character field that displays the status that was issued for the item by the process.

<b>Mapping Status</b>	<ul style="list-style-type: none"><li>• Inbound Mapper</li><li>• Outbound Mapper</li><li>• Inbound Application Databank Extract</li></ul>
-----------------------	---

**Compliance Status** Inbound Editor (Transactions only)

**Acknowledgement Status** • Acknowledgement Reconciliation/Monitor  
• Outbound EDI Databank Extract

**Network Status** Network Reconciliation

**Communications Status\*** • Sterling Connect Offline Utilities  
• Sterling Connect Communications product  
• Sterling Connect Inbound Interface  
• Sterling Connect Outbound Interface  
\*(Sterling Gentran:Plus users only)

**Process Status 1** User Applications

**Date**

An 8-character field that displays the date the item was processed in the format MM/DD/YYYY.

**Time**

A 5-character field that displays the time the item was processed in the format HH:MM.

**Excp**

Displays the number of exceptions that are currently being tracked by Sterling Gentran:Viewpoint Exception Management for the item.

## EDIM711 – Item Reference History Screen

### Purpose

The Item Reference History screen lists all of the processes that an item has been processed by, as long as the process is defined to Sterling Gentran:Viewpoint as a tracking point, and the tracking option is enabled for the tracking point.

The primary purpose of this screen is to list all the different references that are used for an item as it travels from process to process. Processes are listed in chronological order.

```

EDIM711 _____ ITEM REFERENCE HISTORY 06/01/2011
Type Action, press Enter
 8=ItemHist 9=ItemDtl 10=MsgList 11=DataDisp 15=Excps

Reference: INBOUND BATCH 4125
Process    VPIBCOMM

A Item Process Description Reference
---
U VPIBCOMM SAMPLE INBOUND COMMU INBOUND BATCH 4125
T EBDI001 INBOUND EDITOR 000000001 /000000001 /000000001
F EBDI001 INBOUND EDITOR 000000001 /000000001
I EBDI001 INBOUND EDITOR 000000001
D EBDI041 INBOUND MAPPER INV01
U VPIBAPPL SAMPLE INBOUND USER INV01
---
---
---
---
---
---
F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel

```

### Actions

- 8=ItemHist** Enter **8** on the line of the item to be selected and press **Enter** to display the Item Status History screen for the item. Processes are listed in chronological order.
- 9=ItemDtl** Enter **9** on the line of the item to be selected and press **Enter** to display the Item Process Detail screen for the item.
- 10=MsgList** Enter **10** on the line of the item to be selected and press **Enter** to display the Item Message List screen. This screen lists all messages that were issued for the item.
- For Sterling Gentran processes, all messages issued by the process are listed.
- For Sterling Connect processes, the explanation text associated with a communications failure code is displayed
- For User processes, only the messages that were passed to Sterling Gentran:Viewpoint for the item by the user application are displayed.
- 11=DataDisp** Enter **11** on the line of the item to be selected and press **Enter** to display the data for the item.
- For items originating from the Sterling Gentran translation system, the Item Data Display screen will display the data for the item. All messages for the item will be

inserted into the data in the appropriate places. To use this action, the Sterling Gentran Databank Message Store must be implemented.

For items originating from the Sterling Connect communications system, the Sterling Gentran:Plus Interchange Detail screen (EDIM402) will display the data for the item.

**15=Excps** Enter **15** on the line of the item to be selected and press **Enter** to display the Item Exception Status screen. This screen lists all recipients that captured the item in Sterling Gentran:Viewpoint Exception Management.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F7=Bkwd** Scroll backward through the list on the current screen.

**F8=Fwd** Scroll forward through the list on the current screen.

**F12=Cancel** Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### Reference

A 1- to 45-character field that displays reference identification for the item, based on the item type.

For EDI items, the reference is the Envelope Reference IDs.

For application items, the reference is defined in the mapping process.

For communication items, the reference is the assigned Batch ID.

For user application items, the reference is passed from the User Application with the item.

### Process

A 1- to 8-character field entered by the user to display the process ID to control which process is positioned at the top of the list.

### A (Action)

A 1- to 2-character field entered by the user to request an action for an item. Refer to **Actions** above for detailed information.



### Item

A 1-character field where the Item type of the item is displayed.

- |                           |   |
|---------------------------|---|
| <b>B</b> Batch*           | <ul style="list-style-type: none"><li>• Sterling Connect Offline Utilities</li><li>• Sterling Connect Communications product</li><li>• Sterling Connect Inbound Interface</li><li>• Sterling Connect Outbound Interface</li></ul> *(Sterling Gentran:Plus users only) |
| <b>D</b> Document         | <ul style="list-style-type: none"><li>• Inbound Mapper</li><li>• Outbound Mapper</li><li>• Inbound Application Databank Extract</li></ul>   |
| <b>F</b> Functional Group | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li></ul>   |
| <b>I</b> Interchange      | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li><li>• Network Reconciliation</li></ul>  |
| <b>T</b> Transaction      | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li></ul>   |
| <b>U</b> U:[type]         | 1- to 16-character value. The user item types have been defined by the user on the User Tracking Point Definitions.   |

### Process

A 1- to 8-character field which displays the process ID that processed the item at the date and time shown.

### Description

A 1- to 20-character field which displays the description of the process as defined in the Tracking Point definition.

### Reference

A 1- to 40-character field which displays the reference for the item used by the process.

## EDIM712 – Item Process Detail Screen – Sterling Gentran Item

### Purpose

The Item Process Detail – Sterling Gentran Item screen displays detailed item information for a single Sterling Gentran tracking point that processed the item.

The following is an example of the Sterling Gentran:Basic Item Process Detail screen in Partner/Qualifier mode.

```

EDIM712 _____ ITEM PROCESS DETAIL 06/01/2011
Type Action, press Enter.
  __ 8=ItemHist 10=MsgList 11=DataDisp 13=ItemRefs 14=Query 15=Excps

Item Identification
Item Type . . . : TRANSACTION
Reference . . . : 000000005 /000000007 /000070001
Trace ID . . . : IE00000001 To/From: IE00000002
User Reference: INV01

System/Process: GENTRAN /EBDI001 Recip/Action: @EDITORS /
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Direction/Set : INBOUND /810 Excp. Status: OPEN
Application . . :
Network . . . . :
Partner . . . . : VENDOR-1
Qual . . . . . :
Databank . . . : GENTRAN
Process Statuses
Ack Status . . . : ERROR Mapping Status :
Comp Status . . . : 04 Network Status :
Env Status . . . : 00 Seq Status . . . : 00

F1=Help F3=Exit F12=Cancel

```

The following is an example of the Sterling Gentran:Basic Item Process Detail screen in Relationship mode.

```

EDIM712 _____ ITEM PROCESS DETAIL 06/01/2011
Type Action, press Enter.
  ___ 8=ItemHist 10=MsgList 11=DataDisp 13=ItemRefs 14=Query 15=Excps

Item Identification
Item Type . . . : TRANSACTION
Reference . . . : 000000005 /000000007 /000070001
Trace ID . . . : IE00000001 To/From: IE00000002
User Reference: INV01

System/Process: GENTRAN /EBDI001 Recip/Action: @EDITORS /
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Direction/Set : INBOUND /810 Excp. Status: OPEN
Application . . :
Network . . . . :
User . . . . . : VENDOR-1
Partner . . . . :
Databank . . . : GENTRAN
Process Statuses
  Ack Status . . : ERROR Mapping Status :
  Comp Status . . : 04 Network Status :
  Env Status . . : 00 Seq Status . . : 00

F1=Help F3=Exit F12=Cancel
    
```

The following is an example of the Sterling Gentran:Realtime Item Process Detail screen in Partner/Qualifier mode.

```

EDIM712 _____ ITEM PROCESS DETAIL 06/01/2011
Type Action, press Enter.
  ___ 8=ItemHist 10=MsgList 11=DataDisp 13=ItemRefs 14=Query 15=Excps

Item Identification
Item Type . . . : TRANSACTION
Reference . . . : 000000006 /000000008 /000080001
Trace ID . . . : EI00000001 To/From: EI00000002
User Reference: INV01

System/Process: GENTRAN /EDIR001 Recip/Action: @EDITORS /
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Direction/Set : INBOUND /810 Excp. Status: OPEN
Application . . : Trans. ID/Task: EDIT/0000189
Network . . . . : Path ID/Option: 203/203
Partner . . . . : VENDOR-1
Qual . . . . . : Queue File:
Databank . . . : REALTIME
Process Statuses
  Ack Status . . : ERROR Mapping Status :
  Comp Status . . : 04 Network Status :
  Env Status . . : 00 Seq Status . . : 00

F1=Help F3=Exit F12=Cancel
    
```

The following is an example of the Sterling Gentran:Realtime Item Process Detail screen in Relationship mode.

```

EDIM712 _____ ITEM PROCESS DETAIL 06/01/2011
Type Action, press Enter.
  __ 8=ItemHist 10=MsgList 11=DataDisp 13=ItemRefs 14=Query 15=Excps

Item Identification
Item Type . . : TRANSACTION
Reference . . : 000000006 /000000008 /000080001
Trace ID . . : EI00000001 To/From: EI00000002
User Reference: INV01

System/Process: GENTRAN /EDIR001 Recip/Action: @EDITORS /
Date-Time . . : 06/01/2011 - 12:00 Action Dt-Tm:
Direction/Set : INBOUND /810 Excp. Status: OPEN
Application . : Trans. ID/Task: EDIT/0000189
Network . . . : Path ID/Option: 203/203
User . . . . : VENDOR-1
Partner . . . : Queue File:
Databank . . : REALTIME
Process Statuses
Ack Status . . : ERROR Mapping Status :
Comp Status . . : 04 Network Status :
Env Status . . : 00 Seq Status . . : 00

F1=Help F3=Exit F12=Cancel
    
```

## Actions

- 8=ItemHist** Enter **8** and press **Enter** to display the Item Status History screen for the item. Processes are listed in chronological order.
- 10=MsgList** Enter **10** and press **Enter** to display the Item Message List screen. This screen lists all messages that were issued for the item.  
For Sterling Gentran processes, all messages issued by the process are listed.  
For User processes, only the messages that were passed to Sterling Gentran:Viewpoint for the item, by the user application, are displayed.
- 11=DataDisp** Enter **11** and press **Enter** to display the Item Data Display screen showing the data for the item. All messages for the item are inserted into the data in the appropriate places. To use this action, the Sterling Gentran Databank Message Store must be implemented.
- 13=ItemRefs** Enter **13** and press **Enter** to display the Item Reference History screen for the item. This screen provides a list of all references associated with the item, based on the processes that processed the item.
- 14=Query** Enter **14** and press **Enter** to return to the Query Request screen. The search fields and any items that were displayed when entering this screen are redisplayed on the Query Request screen.
- 15=Excps** Enter **15** and press **Enter** to display the Item Exception Status screen. This screen lists all recipients that captured the item in Sterling Gentran:Viewpoint Exception Management.

## Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F12=Cancel** Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1- to 2-character field where you may enter actions for the item displayed. Refer to **Actions** above for details regarding the available actions for this screen.

## Item Identification

### Item Type

The 1- to 16-character field where the Item type of the item is displayed.

- |                         |  |
|-------------------------|--|
| <b>Document</b>         | <ul style="list-style-type: none"><li>• Inbound Mapper</li><li>• Outbound Mapper</li><li>• Inbound Application Databank Extract</li></ul>  |
| <b>Functional Group</b> | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li></ul>                                  |
| <b>Interchange</b>      | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li><li>• Network Reconciliation</li></ul> |
| <b>Transaction</b>      | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li></ul>                                  |

### Reference

A 1- to 45-character field which displays the reference identification for the item, based on the item type.

For EDI items, the reference is the Envelope Reference IDs.

For Application items, the reference is defined in the mapping process.

For User Application items, the reference is passed from the User Application with the item.

**Trace ID**

Tracking Management assigns and manages a Trace ID for items being tracked by Sterling Gentran:Viewpoint. The Trace ID provides a link for an item between processes and also provides a means for you to reference an item.

Tracking Management assigns a Trace ID to an item when the initial process for an item passes the item to Sterling Gentran:Viewpoint. That Trace ID is passed back to the initial process, which then passes it along with the items data to subsequent processes. Subsequent processes use the Trace ID when passing process information for the item to Sterling Gentran:Viewpoint through the Sterling Gentran:Viewpoint user gateway.

**To/From:**

If the item being viewed belongs to a larger item, then the Trace ID for the larger item is displayed. For example, an outbound transaction belonging to a functional group. In this case, the Trace ID assigned to the functional group is displayed in the To/From field.

**User Reference**

A 1- to 45-character field which displays the User Reference identification for the Transaction Item Type. This field is only displayed for transaction item types.

**System/Process**

The system and process which processed this item.

**Date-Time**

The date (MM/DD/YYYY) and time (HH:MM) the item was processed by this system/process.

**Direction/Set**

The direction of the item and the set ID value used by the process to identify the type of document.

**Inbound**            From partner to user.

**Outbound**         From user to partner.

1- to 6-character value for the set.

**Application**

For Sterling Gentran item types, the Application Data ID is displayed. For user item types, the application ID passed to Sterling Gentran:Viewpoint from the user application is displayed.

**Network**

For Sterling Gentran item types, the Network ID as defined to Sterling Gentran for the item is displayed. For User item types, the Network ID passed to Sterling Gentran:Viewpoint from the user application is displayed.

**User (Partner)**

For Sterling Gentran item types, the Trading Profile User ID used by (Partner) translation for the item is displayed. Based on the trading profile mode defined, this field may be displayed as either the User ID or the Partner ID.

For User item types, the User value that was passed to Sterling Gentran:Viewpoint by the user application is displayed.

**Partner (Qualifier)**

For Sterling Gentran item types, the Trading Profile Partner ID used by (Qualifier) translation for the item is displayed. Based on the trading profile mode defined, this field may be displayed as either the Partner ID or the Qualifier ID.

For User item types, the Partner value that was passed to Sterling Gentran:Viewpoint by the user application is displayed.

**Databank**

The Databank System used to process the item, is displayed in this field.

**Recip/Action**

The recipit/action fields identify who/how notification for the exception was delivered by Exception Management.

**Note:** The exception information provided here is for the **last** exception that was detected for the item by Sterling Gentran:Viewpoint Exception Management. You may use the **15=Excps** action to view detailed exception information for the item.

**Action Dt-Tm**

If an action was initiated for the exception, this field displays the date and time the action was initiated. The formats used are MM/DD/YYYY and HH:MM.

**Excp. Status**

The current Sterling Gentran:Viewpoint exception status is displayed here. Possible values are:

<b>Open</b>	The exception is currently open.
<b>Closed</b>	The exception has been closed.
<b>Purged</b>	The exception has been purged.
<b>Review</b>	The exception is in review.
<b>Transfer</b>	The exception has been transferred.

**Trans ID/Task**

The CICS Transaction ID and Task Number used to process the item are displayed in this field. This is only available for Sterling Gentran:Realtime items.

**Path ID/Option**

The Path ID and Option Number used to process the item are displayed in this field. This is only available for Sterling Gentran:Realtime items.

**Queue File**

The Queue File Number which contained the output data for the item, is displayed in this field. This is only available for Sterling Gentran:Realtime items.

---

## Process Status

Statuses generated by the process for the item are displayed. For User item types, up to three process statuses may be displayed. For Sterling Gentran item types, there will be six status fields displayed.

### Ack Status

The acknowledgment status for the item.

<b>Accepted</b>	The item has been accepted.
<b>Accepted/ Error</b>	The item contained error(s), but was accepted.
<b>Indeterminate</b>	The item status could not be determined.
<b>Overdue</b>	The item acknowledgment is overdue.
<b>Partial</b>	The item was partially accepted.
<b>Rejected</b>	The item was rejected.
<b>Waiting</b>	The item status is not yet determined.

### Comp Status

The compliance status for the item (Only for Inbound transactions).

<b>00</b>	No errors were encountered.
<b>04</b>	One or more element errors were encountered.
<b>08</b>	One or more missing or misplaced segments were encountered.
<b>12</b>	The transaction set was incomplete.

### Env Status

The envelope status for the item.

<b>00</b>	No errors encountered in the document.
<b>04</b>	One or more errors (other than authorization and sequence errors) were encountered in processing the Transmission Envelope, or one or more errors (other than unknown user or partner) were encountered in processing the Functional Group Envelope.
<b>08</b>	Either no Partner ID/Qualifier or User/Partner was found corresponding to the sender/receiver codes contained in the Functional Group, or the segment count contained in the Transaction Set Trailer was found to be in error.



**Mapping Status**

The current mapping status for the item.

- |           |  |
|-----------|--|
| <b>00</b> | No errors were encountered during the mapping process. |
| <b>04</b> | One or more non fatal mapping errors were encountered. |
| <b>12</b> | An outbound document could not be translated.          |

**Network Status**

The network status for the item.

- |                       |   |
|-----------------------|---|
| <b>Errors</b>         | The transmission contained errors.                      |
| <b>Picked Up</b>      | The transmission was picked up by your trading partner. |
| <b>Processed</b>      | The transmission was processed by the network.          |
| <b>Received</b>       | The transmission was received by the network.           |
| <b>Manual Network</b> | The transmission status was manually determined.        |
| <b>Waiting</b>        | The transmission status is not yet determined.          |

**Seq Status**

The sequence status for the item.

- |           |                                   |
|-----------|-----------------------------------|
| <b>00</b> | No errors.                        |
| <b>04</b> | Sequence errors were encountered. |

## EDIM712 – Item Process Detail Screen – Sterling Connect Item

### Purpose

This screen is only available for Sterling Gentran:Plus users who have enabled communications monitoring in Sterling Gentran:Viewpoint.

The Item Process Detail – Sterling Connect Item screen displays detailed item information for a single Sterling Connect tracking point that processed the item.

```

EDIM712 _____ ITEM PROCESS DETAIL 06/01/2011
Type Action, press Enter.
  8=ItemHist 10=MsgList 11=DataDisp 13=ItemRefs 14=Query 15=Excps

Item Identification
Item Type . . . : BATCH
Reference . . . : 00000000000070
Trace ID . . . : BA00000009 To/From:

System/Process: CONNECT /STOUTL Recip/Action:
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Batch # . . . . : 0000185 Excp. Status:
Remote ID . . . : REMOTE1
Direction . . . : OUTBOUND
Failure Code :

Process Statuses
Added . . . . . : Y Extracted . . . . :
Collected . . . : Incomplete . . . :
Comm Protocol : Transmitted :

F1=Help F3=Exit F12=Cancel

```

### Actions

- 8=ItemHist** Enter **8** and press **Enter** to display the Item Status History screen for the item. Processes are listed in chronological order.
- 10=MsgList** Enter **10** and press **Enter** to display the Item Message List screen. This screen lists all messages issued for the item.  
For Sterling Connect processes, the explanation text associated with a communications failure code is displayed.
- 11=DataDisp** Enter **11** and press **Enter** to display the data for the item.  
The Sterling Gentran:Plus Interchange Detail screen (EDIM402) displays the data for the item.
- 13=ItemRefs** Enter **13** and press **Enter** to display the Item Reference History screen for the item. This screen provides a list of all references associated with the item, based on the processes that processed the item.
- 14=Query** Enter **14** and press **Enter** to return to the Query Request screen. The search fields and any items displayed when entering this screen are redisplayed on the Query Request screen.

**15=Excps** Enter **15** and press **Enter** to display the Item Exception Status screen. This screen lists all recipients that captured the item in Sterling Gentran:Viewpoint Exception Management.

## Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F12=Cancel** Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1- to 2-character field where the you may enter actions for the item displayed. Refer to **Actions** above for details regarding the available actions for this screen.

## Item Identification

### Item Type

The 1- to 16-character field where the Item type of the item is displayed.

- Batch**
- Sterling Connect Offline Utilities
  - Sterling Connect Communications product
  - Sterling Connect Inbound Interface
  - Sterling Connect Outbound Interface

### Reference

A 1- to 45-character field which displays the reference identification for the item based on the item type.

For Communication items, the reference is the assigned Batch ID.

### Trace ID

Tracking Management assigns and manages a Trace ID for items being tracked by Sterling Gentran:Viewpoint. The Trace ID provides a link for an item between processes and also provides a means for the user to reference an item.

Tracking Management assigns a Trace ID to an item when the initial process for an item passes the item to Sterling Gentran:Viewpoint. That Trace ID is passed back to the initial process, which then passes it along with the items data to subsequent processes.

Subsequent processes use the Trace ID when passing process information for the item to Sterling Gentran:Viewpoint through the Sterling Gentran:Viewpoint user gateway.

### To/From:

If the item being viewed belongs to a larger item, then the Trace ID for the larger item is displayed. For example, an outbound transaction belonging to a functional group. In this case, the Trace ID assigned to the functional group will be displayed in the To/From field.

**System/Process**

The system and process which processed this item.

**Date-Time**

The date (MM/DD/YYYY) and time (HH:MM) the item was processed by this system/process.

**Batch #**

The Batch Number assigned to the communications batch by the Sterling Connect system.

**Remote ID**

The Remote ID/Mailbox associated to the communications batch.

**Direction**

The direction of the communications data.

**Inbound**            From partner to user.

**Outbound**         From user to partner.

**Failure Code**

The Failure Code associated with a communications error is displayed. This field is blank or zeros if no communications errors were encountered for the communications batch.

To see the explanation for a failure code, enter a **10** and press **Enter** to display the Failure Code text on the Item Message List screen.

**Recip/Action**

The recipient/action fields identify who/how notification for the exception was delivered by Exception Management.

**Note:** The exception information provided here is for the **last** exception that was detected for the item by Sterling Gentran:Viewpoint Exception Management. You may use the **15=Excps** action to view detailed exception information for the item.

**Action Dt-Tm**

If an action was initiated for the exception, this field displays the date and time the action was initiated. The formats used are MM/DD/YYYY and HH:MM.

**Excp. Status**

The current Sterling Gentran:Viewpoint exception status is displayed here. Possible values are:

**Open**                The exception is currently open.

**Closed**             The exception has been closed.

**Purged**             The exception has been purged.

**Review**             The exception is in review.

**Transfer**            The exception has been transferred.

## Process Status

Statuses generated by the process for the item are displayed. For Sterling Connect item types, there will be six status fields displayed.

### Added

Indicates whether the batch was added to the Sterling Connect queues by the Offline Utilities.

**Y** Added Offline by the current process

### Collected

Indicates whether the batch was received by Sterling Connect.

**Y** Collected by the current process.

### Comm Protocol

Indicates which communications protocol method was used to send/receive the data.

**B** Bisync communications data.

**H** Internal communications data.

**S** SNA communications data.

### Extracted

Indicates whether the batch was extracted from the Sterling Connect queues by the Offline Utilities.

**Y** Extracted Offline by the current process.

### Incomplete

Indicates whether the current function (that is, TRANSMIT) was completed successfully for this batch

**Y** Current function completed successfully.

**N** Current function was not completed successfully.

### Transmitted

Indicates whether the batch was sent by Sterling Connect.

**Y** Transmitted by the current process.

## EDIM712 – Item Process Detail Screen – User Item

### Purpose

The Item Process Detail – User Item screen displays detailed item information for a single User tracking point that processed the item.

The following is an example of the Item Process Detail screen in Partner/Qualifier mode.

```

EDIM712 _____ ITEM PROCESS DETAIL 06/01/2011
Type Action, press Enter.
  __ 8=ItemHist 10=MsgList 11=DataDisp 13=ItemRefs 14=Query 15=Excps

Item Identification
Item Type . . . : U:COMM BATCH
Reference . . . : INBOUND BATCH 4125
Trace ID . . . : BA00000001 To/From:

System/Process: @COMMIB /VPIBCOMM Recip/Action:
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Direction/Set : INBOUND / Excp. Status:
Application :
Network . . . :
Partner . . . : REMOTE ID
Qual . . . . :

Process Statuses User Fields
U:COMM. STATUS : RECEIVED U:MAILBOX : BOX-4862
U:STATUS 1 : EXTRACTED U:PHONE NUMBER : 1-614-793-7000
U:STATUS 2 : REXRCT-OK U:COMM. SIZE : 1600 BYTES

F1=Help F3=Exit F12=Cancel

```

The following is an example of the Item Process Detail screen in Relationship mode.

```

EDIM712 _____ ITEM PROCESS DETAIL 06/01/2011
Type Action, press Enter.
  __ 8=ItemHist 10=MsgList 11=DataDisp 13=ItemRefs 14=Query 15=Excps

Item Identification
Item Type . . . : U:COMM BATCH
Reference . . . : INBOUND BATCH 4125
Trace ID . . . : BA00000001 To/From:

System/Process: @COMMIB /VPIBCOMM Recip/Action:
Date-Time . . . : 06/01/2011 - 12:00 Action Dt-Tm:
Direction/Set : INBOUND / Excp. Status:
Application :
Network . . . :
User . . . . : REMOTE ID
Partner . . . :

Process Statuses User Fields
U:COMM. STATUS : RECEIVED U:MAILBOX : BOX-4862
U:STATUS 1 : EXTRACTED U:PHONE NUMBER : 1-614-793-7000
U:STATUS 2 : REXRCT-OK U:COMM. SIZE : 1600 BYTES

F1=Help F3=Exit F12=Cancel

```

## Actions

- 8=ItemHist** Enter **8** and press **Enter** to display the Item Status History screen for the item. Processes are listed in chronological order.
- 10=MsgList** Enter **10** and press **Enter** to display the Item Message List screen. This screen lists all messages that were issued for the item.  
For Sterling Gentran processes, all messages issued by the process are listed.  
For User processes, only the messages that were passed to Sterling Gentran:Viewpoint for the item, by the user application, are displayed.
- 11=DataDisp** For User processes, the data display feature is not available.
- 13=ItemRefs** Enter **13** and press **Enter** to display the Item Reference History screen for the item. This screen provides a list of all references associated with the item, based on the processes that processed the item.
- 14=Query** Enter **14** and press **Enter** to return to the Query Request screen. The search fields and any items that were displayed when entering this screen are redisplayed on the Query Request screen.
- 15=Excps** Enter **15** and press **Enter** to display the Item Exception Status screen. This screen lists all recipients that captured the item in Sterling Gentran:Viewpoint Exception Management.

## Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F12=Cancel** Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1- to 2-character field where the user may enter actions for the item displayed. Refer to **Actions** above for details regarding the available actions for this screen.

## Item Identification

### Item Type

A 1- to 16-character field where the Item type of the item is displayed.

- U:[type]** 1- to 16-character value. The user item type as defined by the user on the User Tacking Point Definitions.

**Reference**

A 1- to 45-character field that displays the reference identification for the item, based on the item type.

For User Application items, the reference is passed from the User Application with the item.

**Trace ID**

Tracking Management assigns and manages a Trace ID for items being tracked by Sterling Gentran:Viewpoint. The Trace ID provides a link for an item between processes and also provides a means for you to reference an item.

Tracking Management assigns a Trace ID to an item when the initial process for an item passes the item to Sterling Gentran:Viewpoint. That Trace ID is passed back to the initial process, which then passes it along with the items data to subsequent processes.

Subsequent processes use the Trace ID when passing process information for the item to Sterling Gentran:Viewpoint through the Sterling Gentran:Viewpoint user gateway.

**To/From:**

If the item being viewed belongs to a larger item, then the Trace ID for the larger item is displayed. For example, an outbound transaction belonging to a functional group. In this case, the Trace ID assigned to the functional group is displayed in the To/From field.

**System/Process**

The system and process which processed this item.

**Date-Time**

The date (MM/DD/YYYY) and time (HH:MM) the item was processed by this system/process.

**Direction/Set**

The direction of the item and the set ID value that is used by the process to identify the type of document.

**Inbound**            From partner to user

**Outbound**        From user to partner

1- to 6-character value for the set.

**Application**

For User item types, the application ID passed to Sterling Gentran:Viewpoint from the user application is displayed.

**Network**

For User item types, the Network ID passed to Sterling Gentran:Viewpoint from the user application is displayed.

**User (Partner)**

For User item types, the User value passed to Sterling Gentran:Viewpoint by the user application is displayed.

**Partner (Qualifier)**

For User item types, the Partner value passed to Sterling Gentran:Viewpoint by the user application is displayed.



**Recip/Action**

The recipient/action fields identify who/how notification for the exception was delivered by exception management.

**Note:** The exception information provided here is for the **last** exception that was detected for the item by Sterling Gentran:Viewpoint Exception Management. You may use the **15=Excps** action to view detailed exception information for the item.

**Action Dt-Tm**

If an action was initiated for the exception, this field displays the date and time the action was initiated. The format used is MM/DD/YYYY and HH:MM.

**Excp. Status**

The current Sterling Gentran:Viewpoint exception status is displayed here. Possible values are:

<b>Open</b>	The exception is currently open.
<b>Closed</b>	The exception has been closed.
<b>Purged</b>	The exception has been purged.
<b>Review</b>	The exception is in review.
<b>Transfer</b>	The exception has been transferred.

**Process Statuses**

Statuses generated by the process for the item are displayed here. Up to three statuses may be displayed for User item types.

For User item types, the statuses are the value passed from the user application to Sterling Gentran:Viewpoint for the item. The possible statuses that a user may pass are defined by the user on the User Tracking Point Definition. The Process Status labels defined on the User Tracking Point Definition are used here for the Process Status labels.

The Process Status labels are a 1- to 15-character value that must have "U:" as the first 2 characters. The Process Status is any 1- to 10-character value.

**User Fields**

Up to three user fields may be passed from the user application to Sterling Gentran:Viewpoint. The possible user fields that a user may pass are defined on the User Tracking Point Definition.

The User Field labels are a 1- to 15-character value that must have "U:" as the first 2 characters. The User Field values are any 1- to 15-character value.

## EDIM715 – Item Message List Screen

### Purpose

The Item Message List screen displays the item in context with any associated system messages.

```

EDIM715 _____ ITEM MESSAGE LIST 06/01/2011
Type Action, press Enter.
 8=ItemHist 9=ItemDtl 11=DataDisp 13=ItemRefs 15=Excps

System   : @COMMIB
Process  : VPIBCOMM
Desc.    : SAMPLE INBOUND COMMUNICATIONS APPLICATION
Item Type: U:COMM BATCH
Reference: INBOUND BATCH 4125

A Message
___ RECEIVED INBOUND DATA FROM COMMUNICATIONS
___
___
___
___
___
___
___
___
___
___

LAST ENTRY DISPLAYED
F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel

```

### Actions

- 8=ItemHist** Enter **8** and press **Enter** to display the Item Status History screen for the current item. Processes are listed in chronological order.
- 9=ItemDtl** Enter **9** and press **Enter** to display the Item Process Detail screen for the current item.
- 11=DataDisp** Enter **11** and press **Enter** to display the data for the current item.
- For items originating from the Sterling Gentran translation system, the Item Data Display screen displays the data for the item. All messages for the item are inserted into the data in the appropriate places. To use this action, the Sterling Gentran Databank Message Store must be implemented.
- For items originating from the Sterling Connect communications system, the Sterling Gentran:Plus Interchange Detail screen (EDIM402) displays the data for the item.
- 13=ItemRefs** Enter **13** and press **Enter** to display the Item Reference History screen for the current item. This screen provides a list of all references associated with the item, based on the processes that processed the item.
- 15=Excps** Enter **15** and press **Enter** to display the Item Exception Status screen. This screen lists all recipients that captured the item in Sterling Gentran:Viewpoint Exception Management.

## Function Keys

- F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- F3=Exit** Returns to the previous menu.
- F7=Bkwd** Scroll backward through the list on the current screen.
- F8=Fwd** Scroll forward through the list on the current screen.
- F12=Cancel** Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### System

The system which processed the item is displayed in this field.

### Process

A 1- to 8-character field which displays the process ID that processed the item.

### Desc.

The description for the tracking point is displayed in this field.

### Item Type

A 1- to 16-character field which displays Item type of the item.

- |                         |  |
|-------------------------|--|
| <b>Batch*</b>           | <ul style="list-style-type: none"><li>• Sterling Connect Offline Utilities</li><li>• Sterling Connect Communications product</li><li>• Sterling Connect Inbound Interface</li><li>• Sterling Connect Outbound Interface</li></ul> *(Sterling Gentrans:Plus users only) |
| <b>Document</b>         | <ul style="list-style-type: none"><li>• Inbound Mapper</li><li>• Outbound Mapper</li><li>• Inbound Application Databank Extract</li></ul>  |
| <b>Functional Group</b> | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li></ul>  |
| <b>Interchange</b>      | <ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li><li>• Network Reconciliation</li></ul>   |

<b>Transaction</b>	<ul style="list-style-type: none"><li>• Inbound Editor</li><li>• Outbound Editor</li><li>• Outbound EDI Databank Extract</li><li>• Acknowledgement Reconciliation/Monitor</li></ul>
<b>U:[type]</b>	Any 1- to 16-character value the user determines for classifying different data types that they wish to monitor using Sterling Gentran:Viewpoint. These user item types are defined in the User Tracking Points that have been created in Extended System Management.

**Reference**

A 1- to 45-character field which displays the reference identification for the item based on the item type.

For EDI items, the reference is the Envelope Reference IDs.

For Application items, the reference is defined in the mapping process.

For Communication items, the reference is the assigned Batch ID.

For User Application items, the reference is passed from the User Application with the item.

**A (Action)**

A 1- to 2-character field where you may enter actions that apply to the messages. Refer to **Actions** above for details regarding the available actions for this screen.

**Message**

For Sterling Gentran item types, all messages issued by the process are displayed here.

For Sterling Connect item types, the explanation text associated with a communications failure code is displayed.

For User item types, the message that was passed to Sterling Gentran:Viewpoint by the user application for the item, is displayed here.

## EDIM716 – Item Data Display Screen

### Purpose

The Item Data Display screen allows you to view the actual data that was processed and any associated system messages. The Item Data Display screen will only display data for Sterling Gentran Item Types.

```

EDIM716 _____ ITEM DATA DISPLAY 06/01/2011
Type Action, press Enter.
___ 8=ItemHist 9=ItemDtl 10=MsgList 13=ItemRefs 15=Excps

System : GENTRAN
Process : EBDI001
Desc. : INBOUND EDITOR
Item Type: TRANSACTION
Reference: 000000005 /000000007 /000070001

Item Data
ST*810*000070001?
BIG*90QQ05*INV01*901101*PONUMBER-001?
NTE**-----?
NTE**          TERMS ARE SPECIFIED BELOW?
NTE** DISCOUNT WILL NOT BE APPLIED UNLESS INVOICE IS PAID?
NTE** IN FULL BY THE DISCOUNT DUE DATE.?
NTE**-----?
REF*DP*00547?
REF*BC*CONTRACT42?
REF*BT*000001?
REF*SR*JOHN BILLING?

F1=Help F3=Exit F6=Next F7=Bkwd F8=Fwd F12=Cancel

```

### Actions

- 8=ItemHist** Enter **8** and press **Enter** to display the Item Status History screen for the item. Processes are listed in chronological order.
- 9=ItemDtl** Enter **9** and press **Enter** to display the Item Process Detail screen for the item.
- 10=MsgList** Enter **10** and press **Enter** to display the Item Message List screen. This screen lists all messages that were issued for the item.  
  
For Sterling Gentran processes, all messages issued by the process are listed.  
  
For User processes, only the messages passed to Sterling Gentran:Viewpoint for the item by the user application are displayed.
- 13=ItemRefs** Enter **13** and press **Enter** to display the Item Reference History screen for the item. This screen provides a list of all references associated with the item, based on the processes that handled the item.
- 15=Excps** Enter **15** and press **Enter** to display the Item Exception Status screen. This screen lists all recipients that captured the item in Sterling Gentran:Viewpoint Exception Management.

## Function Keys

<b>F1=Help</b>	If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
<b>F3=Exit</b>	Returns to the previous menu.
<b>F6=Next</b>	Displays the next message within the data for the item. Skips to the next block of data that has an associated message. This function key allows you to quickly scan through the messages issued for an item within the context of the data for the item.
<b>F7=Bkwd</b>	Scroll backward through the list on the current screen.
<b>F8=Fwd</b>	Scroll forward through the list on the current screen.
<b>F12=Cancel</b>	Back up in the dialog, one screen at a time.

## Field Descriptions

### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### (Action)

A 1- to 2-character field entered by the user to request an action for the item. Refer to **Actions** above for details regarding the available actions for this screen.

### System

The system which was processing the item is displayed in this field.

### Process

A 1- to 8-character field which displays the process ID that processed the item.

### Desc.

The description of the system/process as defined in the Tracking Point definition.

### Item Type

A 1- to 16-character field which displays the Item type of the item.

<b>Document</b>	<ul style="list-style-type: none"> <li>• Inbound Mapper</li> <li>• Outbound Mapper</li> <li>• Inbound Application Databank Extract</li> </ul>
<b>Functional Group</b>	<ul style="list-style-type: none"> <li>• Inbound Editor</li> <li>• Outbound Editor</li> <li>• Outbound EDI Databank Extract</li> <li>• Acknowledgement Reconciliation/Monitor</li> </ul>
<b>Interchange</b>	<ul style="list-style-type: none"> <li>• Inbound Editor</li> <li>• Outbound Editor</li> <li>• Outbound EDI Databank Extract</li> <li>• Acknowledgement Reconciliation/Monitor</li> <li>• Network Reconciliation</li> </ul>

- Transaction**
- Inbound Editor
  - Outbound Editor
  - Outbound EDI Databank Extract
  - Acknowledgement Reconciliation/Monitor

**Reference**

A 1- to 45-character field which displays the reference identification for the item based on the item type.

For EDI items, the reference is the Envelope Reference IDs.

For Application items, the reference is defined in the mapping process.

For User Application items, the reference is passed from the User Application with the item.

**Item Data**

All data for the specified item, with all of the tracking point and user messages inserted into the data, is displayed. Messages inserted in the data are marked with an asterisk (for example, \*msg).

## EDIM718 – Item Exception Status Screen

### Purpose

The purpose of Item Exception Status screen is to list all exceptions that are currently being tracked by Exception Management for the item. With this release only, Sterling Gentran and Sterling Connect item types can have their exceptions monitored by Sterling Gentran:Viewpoint.

```

EDIM718 _____ ITEM EXCEPTION STATUS 06/01/2011
Type Action, press Enter.
__ 8=ItemHist 9=ItemDtl 10=MsgList 11=DataDisp 13=ItemRefs 16=ExcpDtl

System : GENTRAN
Process : EBDI001
Desc. : INBOUND EDITOR
Item Type: TRANSACTION
Reference: 000000005 /000000007 /000070001

A Recipient Action Status Date Time Capture ID
__ @EDITORS OPEN 06/01/2011 12:00 @MODEL-IE
__
__
__
__
__
__
__
__

F1=Help F3=Exit F7=Bkwd F8=Fwd F12=Cancel

```

### Actions

- 8=ItemHist** Enter **8** and press **Enter** to display the Item Status History screen for the item. Processes are listed in chronological order.
- 9=ItemDtl** Enter **9** and press **Enter** to display the Item Process Detail screen for the item.
- 10=MsgList** Enter **10** and press **Enter** to display the Item Message List screen. This screen lists all messages issued for the item.
- For Sterling Gentran processes, all messages issued by the process are listed.
- For Sterling Connect processes, the explanation text associated with a communications failure code is displayed.
- For User processes, only the messages passed to Sterling Gentran:Viewpoint for the item by the user application are displayed.
- 11=DataDisp** Enter **11** and press **Enter** to display the data for the item.
- For items originating from the Sterling Gentran translation system, the Item Data Display screen will display the data for the exception. All messages for the item will be inserted into the data in the appropriate places. To use this action, the Sterling Gentran Databank Message Store must be implemented.
- For items originating from the Sterling Connect communications system, the Sterling Gentran:Plus Interchange Detail screen (EDIM402) displays the data for the item.



**13=ItemRefs** Enter **13** and press **Enter** to display the Item Reference History screen for the item. This screen provides a list of all references associated with the item based on the processes that handled the item.

**16=ExcpDtl** Enter **16** on the line of the exception to be selected and press **Enter** to display the Exception Detail screen in the Exception Inquiry functional area. This screen displays the exception detail information for the item.

**Note:** The **ExcpDtl** action is only valid for the Action column beside the item list.

### Function Keys

**F1=Help** If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.

**F3=Exit** Returns to the previous menu.

**F7=Bkwd** Scroll backward through the list on the current screen.

**F8=Fwd** Scroll forward through the list on the current screen.

**F12=Cancel** Back up in the dialog, one screen at a time.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

#### (Action)

A 1- to 2-character field where you may enter actions that apply to the entire Item Exception Status screen. Actions that apply to individual items in the list must be entered beside the item in the list's A(action) column.

The actions that may be entered in the screen level Action field are:

8	=	ItemHist
9	=	ItemDtl
10	=	MsgList
11	=	DataDisp
13	=	ItemRefs

#### System

The system that processed the item to which the exception belongs.

#### Process

The process that processed the item to which the exception belongs.

#### Desc.

The description of the system/process as defined in the tracking point definition.

#### Item Type

The Item type of the item is displayed here.

**Reference**

A 1- to 45-character field which displays the reference identification for the item based on the item type.

For EDI items, the reference is the Envelope Reference ID.

For Application items, the reference is defined in the mapping process.

For Communication items, the reference is the assigned Batch ID.

For User Application items, the reference is passed from the User Application with the item.

**A (Action)**

A 1- to 2-character field where you may enter actions that apply to individual items.

Actions that apply to the entire Item Exception Status screen must be entered in the screen level action field in the top left corner of the screen.

The action that may be entered in the item level Action field is:

16 = ExcpDtl

**Recipient**

The recipient that the exception was captured for by Exception Management.

**Action**

The exception action initiated by Exception Management for the item.

**Status**

The current status of the exception.

<b>Closed</b>	The exception has been closed.
<b>Open</b>	The exception is currently open.
<b>Purged</b>	The exception has been purged.
<b>Review</b>	The exception is in review.
<b>Transfer</b>	The exception has been transferred.

**Date**

An 8-character field which displays the date the exception was captured in the format MM/DD/YYYY.

**Time**

A 5-character field which displays the time the exception was captured in the format HH:MM.

**Capture ID**

The exception capture definition ID used by Exception Management to detect that the exception occurred.

### Log Display Screens

#### Log Display Navigation

This section contains detailed information on the Log Display screens. The purpose of each screen and how to use the associated fields are described in detail in this section.

The navigation for Log Display is illustrated in Figure 5.6.



**Figure 5.6 Log Display Navigation**

## EDIM688 – Online Log Display Screen

### Purpose

The Online Log Display screen allows you to monitor any exception situations which are encountered by the background online Sterling Gentran:Viewpoint system.

The Online Log Display screen displays data the same way as a *console log*; the most recent entries display at the bottom of the screen. As new entries are added to the file, the display scrolls upwards.

This screen only displays log messages generated by applications in the Sterling Gentran:Viewpoint system. To view messages generated by the Sterling Gentran:Basic, Sterling Gentran:Control, or Sterling Gentran:Realtime system, use the Online Log Display screen for the corresponding system.

```

EDIM688 9.99          VIEWPOINT ONLINE LOG DISPLAY          XXX  06/01/2011
                                     12:00:00
Start: 06/01/2011 12:00:00 Stop:                               Last: 12:00:00  Scan: 0005
Filters==>  Errors Only:  _  Program: _____
Position    Task #    TranID    Time        Date        Max Count
Criteria==> _____  _____  _____  _____  _____  3000

   Task  Tran   Time    Date    Term  Program    Error Code
00001  EDIV  12:00:00  06/01/2011  EDIX690  EDI-50302-T 00
VIEWPOINT ONLINE SCANNER BEGINS . . . , DATE: 06/01/2011, TIME: 12:00:00
00001  EDIV  12:00:00  06/01/2011  EDIX690  EDI-50303-T 00
VIEWPOINT ONLINE SCANNER ENDS . . . . , DATE: 06/01/2011, TIME: 12:00:00
00002  EDIZ  12:00:00  06/01/2011  EDIX691  EDI-50100-I 00
VIEWPOINT POST PROCESSOR BEGINS . . . EDIVSF1
00002  EDIZ  12:00:00  06/01/2011  EDIX691  EDI-50101-T 00
VIEWPOINT POST PROCESSOR ENDS . . . . EDIVSF1
00003  EDIZ  12:00:00  06/01/2011  EDIX691  EDI-50100-I 00
VIEWPOINT POST PROCESSOR BEGINS . . . EDIVSF2
00003  EDIZ  12:00:00  06/01/2011  EDIX691  EDI-50101-T 00
VIEWPOINT POST PROCESSOR ENDS . . . . EDIVSF2

Enter PF1=Help          PF3=Exit
      PF7=Bwd  PF8=Fwd

```

### Function Keys

- Enter**            Displays the most current message on the screen.
- PF1=Help**        If the cursor is not on a field, screen level Help information is displayed. If the cursor is on a field, field level Help for that field is displayed.
- PF3=Exit**        Returns to the previous menu.
- PF7=Bwd**        Scroll backward through the messages on the current screen.
- PF8=Fwd**        Scroll forward through the messages on the current screen.

### Field Descriptions

#### (Jump Code)

A 10-character alphabetic or numeric field containing the jump code for this screen. The jump code for a screen automatically appears in the jump code field for that screen.

To "jump" to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, "Jump Codes" for further information on using jump codes.

### **Start** (Protected)

A 10-position field that displays the starting date and an 8-position field that displays the starting time for the most recent start of the Sterling Gentran:Viewpoint Scanner. If the CICS system has been brought up without starting the scanner, this field is blank. The format is MM/DD/YYYY and HH:MM:SS.

### **Stop** (Protected)

A 10-position field that displays the stop date and an 8-position field that displays the stop time for the most recent cycle of the Sterling Gentran:Viewpoint Scanner. This field is completed only when the system status is disabled (on the System Options screen). This field is left blank when either the scanner is running, or the CICS system is brought up and the scanner is not yet started. The format is MM/DD/YYYY and HH:MM:SS.

### **Last** (Protected)

An 8-position field that displays the time of the last scanner run. This field is left blank if the scanner is not running.

### **Scan** (Protected)

A 4-position field that displays the current scan interval. The scan interval (set on the System Options screen) determines the time between runs of the Sterling Gentran:Viewpoint Scanner. The format is HHMM.

### **Filters** (Optional)

Filters restrict Error and message display for a specific program. If you enter values in combination with Position Criteria, the Position Criteria is processed first. When values are not entered, the filters are not active.

#### **Errors Only:** (Optional)

A 1-position alphanumeric field that indicates whether the system should display errors. The errors display starts with the last error message on the screen and processes backwards through a file. If no error message is currently on the screen, error messages display as they are found processing backwards through the file. You may use **PF7=Bwd** or **PF8=Fwd** to scroll through error messages. When you use this in conjunction with the Program Filter, errors display for the specific program entered. Valid values are:

- |              |   |  |
|--------------|---|--|
| <b>Y</b>     | = | Only severe errors, and fatal errors display (error values E, F, S). |
| <b>N</b>     | = | All log information displays.  |
| <b>Space</b> | = | All log information displays.  |

#### **Program** (Optional)

An 8-position alphanumeric field.

After a valid value is entered, only messages for the specified program display. Messages for the specified program display starting with the last message on the screen and processing backwards through the file. If no message is currently displayed, messages display for that program as they are found processing backwards through the file. You may use **PF7=Bwd** or **PF8=Fwd** to scroll through the messages for the program. When you use this in conjunction with the Errors Only Filter, error messages display for the specified program.

### **Position Criteria**

A group of five fields that are used to position the display of the Online Log file at a specific point in the file, based on the criteria in these fields. You can use any combination of position criteria, or leave all these fields blank. When you do not specify position

criteria (all five fields are blank), the last (most recent) record in the file is the last entry on the screen.

When you press **ENTER**, the system searches for log entries matching the position criteria, beginning with the last record on the Online Log file. When you press either **PF7** or **PF8**, the system searches for entries, beginning with the last record displayed on the screen.

**Task #**

A 7-digit numeric field used to position the display of the Online Log file at the most recent entry of a specific CICS task number. Valid values are any valid CICS task number. The system searches for an exact match of the task number in this field.

**TranID**

A 4-position alphanumeric field used to position the display of the Online Log file at the most recent entry of a specific CICS transaction ID. Valid values are any valid CICS transaction ID. The primary Sterling Gentran:Viewpoint transaction IDs are:

<b>EDIV</b>	=	Sterling Gentran:Viewpoint Scanner
<b>EDIW</b>	=	Toggle Program
<b>EDIY</b>	=	Communications Post Processor
<b>EDIZ</b>	=	Post Processor

**Note:** If you are using a system image other than EDI, replace the first three characters of the TranID with your system image characters.

**Time**

An 8-position alphanumeric field used to position the display of the Online Log file. The list begins with entries where the Time field is equal to or less than this value. The time is formatted in the 24-hour format HH:MM:SS.

**Date**

A 10-position alphanumeric field used to position the display of the Online Log file. The list begins with entries where the date field is equal to or less than the value in the Date field (in the Position Criteria group). The date is in the century format MM/DD/YYYY.

**Max Count** (Required)

A 4-position numeric field used to indicate the maximum number of Online Log file entries to read during a search for position criteria.

When the system initially displays this screen, the Max Count field contains the default value as defined on the Configuration Maintenance screen for the Online Options, Record Type 0. If the system finds no records that match the selection criteria, the system displays the message EXCEEDED MAX SEARCH COUNT. You can either press **PF7** to continue the search or increase the value in the Max Count field. An extremely large number in this field may slow down response time.

**Task** (Protected)

A 7-position alphanumeric field that displays the CICS task number of the task issuing the log entry.

**Tran** (Protected)

A 4-position alphanumeric field that displays the CICS transaction ID of the task issuing the log entry.

**Time** (Protected)

An 8-position alphanumeric field that displays the current time of the task issuing the log entry. The time format is HH:MM:SS.

**Date** (Protected)

A 10-position alphanumeric field that displays the current date of the task issuing the log entry. The date format is MM/DD/YYYY.

**Term** (Protected)

A 4-position alphanumeric field that displays the terminal ID of the task issuing the log entry. If this field is blank, the task was executed in background CICS.

**Program** (Protected)

An 8-position alphanumeric field that displays the Sterling Gentran:Viewpoint program issuing the log entry.

**Error Code** (Protected)

A 14-position alphanumeric field that displays the error/informational number, severity indicator, and completion code generated by the task issuing the log entry.

The valid format is:

**EDI-XXXXX-Y-ZZ**

*Where:*

EDI-XXXXX= The message number.

See the *IBM® Sterling Gentran:Basic® for z/OS® Release 6.6 System Message Guide* for information about the indicated message.

Y = The severity indicator.

ZZ = The return code value.

Severity indicator values are:

**I** = Informational. Usually these are trace messages.

**T** = Trace. Produced by the Trace facility.

**W** = Warning. Some action may be required.

**E** = Severe error. Controlled termination of processing.

**F** = Fatal error. Results in immediate termination of processing.

Completion code values are:

**00** = Normal. No warnings or errors occurred.

**04** = Warning. At least one warning level occurred.

**08** = Error. Invalid data was encountered. Some user action to correct data may be required.

**12** = Severe error. Processing was terminated.

**16** = Severe error. Processing was terminated.

See the *IBM® Sterling Gentran:Basic® for z/OS® Release 6.6 System Message Guide* for more information on these codes.

**(Error Message)** (Protected)

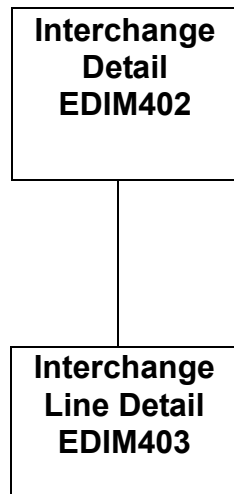
A 73-position alphanumeric field that displays the error/informational message generated by the task issuing the log entry.

## **Sterling Gentran:Plus Screens**

### **Sterling Gentran:Plus Navigation**

This section contains detailed information on the Sterling Gentran:Plus screens that can be accessed directly from Sterling Gentran:Viewpoint. The purpose of each screen and how to use the associated fields are described in detail in this section.

The navigation for Sterling Gentran:Plus is illustrated in Figure 5.7.



**Figure 5.7 Sterling Gentran:Plus Navigation**



## EDIM402 – Interchange Detail Screen

### Purpose

The Interchange Detail screen enables you to view data on the communications data queues.

### How to Access

You can access the Interchange Detail screen from the following screens:

- Exception List (EDIM648)
- Exception Detail (EDIM649)
- Exception Message List (EDIM650)
- Exception History (EDIM652)
- Exception History – 2 (EDIM653)
- User Message Display (EDIM662)
- User Procedure Display (EDIM663)
- Item Status History (EDIM710)
- Item Reference History (EDIM711)
- Item Process Detail (EDIM712)
- Item Message List (EDIM715)
- Item Exception Status (EDIM718)

### Screen Example

The following illustrates the Interchange Detail screen for outbound.

```

Select
EDIM402 6.3 _____ INTERCHANGE DETAIL          XXX      06/01/2011
                                                    12:00:00

Mailbox Id.....: TESTSNA_          Inbound/Outbound..:  O
Batch Number.....: 0000315          Line Number.....:  000001
Batch Id.....: SNA TUTORIAL          Nbr Blocks/Records: 000000100

A
--  $$ADD ID=TESTSNA BATCHID='SNA TUTORIAL'
--  ISA*00*          *00*          *ZZ*513666666        *ZZ*6147937000    *901
--  0*U*00200*000000004*0*P*>?GS*FA*121212*654321*920306*0948*7*X*002002?ST*9
--  70001?AK1*IN*1314?AK9*A*1*1*1?SE*6*000070001?GE*1*7?IEA*1*000000004?
--  ISA*00*          *00*          *ZZ*513666666        *ZZ*6147937000    *901
--  0*U*00200*000000005*0*P*>?GS*IN*121212121*987654321*901105*1200*7*X*00204
--  0*000070001?BIG*901105*INV01*901101*PONUMBER-001?NTE**-----
--  -----?NTE**          TERMS ARE SPECIFIED BELO
--  DISCOUNT WILL NOT BE APPLIED UNLESS INVOICE IS PAID?NTE** IN FULL BY T
--  OUNT DUE DATE.?NTE**-----

Enter PF1=Help          PF3=Exit PF4=Viewpoint PF5=Line Dtl
      PF7=Bwd  PF8=Fwd
    
```

The following illustrates the Interchange Detail screen for inbound.

```

Select
EDIM402 6.3 _____ INTERCHANGE DETAIL          XXX      06/01/2011
                                                    12:00:00

Mailbox Id.....: TESTFTP_          Inbound/Outbound..: I
Batch Number.....: 0000340          Line Number.....: 000001
Batch Id.....: FTP TUTORIAL          Nbr Blocks/Records: 000000100
                                                    SNA/BSC/FTP.....: FTP

A
- $$ADD ID=TESTSNA BATCHID='FTP TUTORIAL'
- ISA*00* . *00* *ZZ*513666666 *ZZ*6147937000 *901
- 0*U*00200*000000004*0*P*>?GS*FA*121212*654321*920306*0948*7*X*002002?ST*9
- 70001?AK1*IN*1314?AK9*A*1*1*1?SE*6*000070001?GE*1*7?IEA*1*000000004?
- ISA*00* *00* *ZZ*513666666 *ZZ*6147937000 *901
- 0*U*00200*000000005*0*P*>?GS*IN*121212121*987654321*901105*1200*7*X*00204
- 0*000070001?BIG*901105*INV01*901101*PONUMBER-001?NTE**-----
- -----?NTE** TERMS ARE SPECIFIED BELO
- DISCOUNT WILL NOT BE APPLIED UNLESS INVOICE IS PAID?NTE** IN FULL BY T
- OUNT DUE DATE.?NTE**-----

Enter PF1=Help          PF3=Exit PF4=Viewpoint PF5=Line Dtl
PF7=Bwd PF8=Fwd
    
```

### Screen Actions

The screen action is displayed on the top line of the Interchange Detail screen. The following table describes the screen action and gives instructions on performing that action.

To perform this action ...	Associated with this screen action ...	Do this ...
View additional line details for a particular line (record) of interchange/batch data.	Select	Type <b>S</b> in the A (Action Code) field for the line of data you want to select, then press <b>PF5</b> .

### Function Key Descriptions

- PF1=Help** If the cursor is not on a label or field, screen level Help information is displayed. If the cursor is on a label or field, specific Help for that label or field is displayed.
- PF3=Exit** Returns to the previous menu.
- PF4=Viewpoint:**Returns to the previous Sterling Gentran:Viewpoint dialog screen.
- PF5=Line Dtl:** Displays the Interchange Line Detail screen for a batch/record when you have typed an **S** in the A (Action Code) field next to the interchange/batch record for which you want to view line details.
- PF7=Bwd:** Scroll backward through the list on the current screen.
- PF8=Fwd:** Scroll forward through the list on the current screen.

## Field Descriptions

**(Jump Code):** (Optional)

A 10-position alphabetic or numeric field containing the jump code for this screen. The jump code for a screen is automatically displayed in the Jump Code field for that screen.

To *jump* to another screen, press **Home**, type the jump code of the screen to which you want to jump, then press **Enter**.

Refer to Chapter 4, “*Jump Codes*” for further information on using jump codes.

**Mailbox Id:** (Required)

An 8-position alphanumeric field. This value is the same as the Communications subsystem Remote ID. It is a part of the key for both the Communication Profile and Remote files.

**Inbound/Outbound:** (Protected)

A 1-position alphabetic field used to designate whether an inbound or outbound batch is displayed. Valid values are:

I	=	Displays outbound batch data details
O	=	Displays inbound batch data details

**Batch Number:** (Optional)

A 7-position numeric field. The value entered in the field sets the display to begin with the batch whose number is greater than or equal to the value entered. This batch number is the same batch number used by Sterling Connect.

**Line Number:** (Optional)

A 6-position numeric field used to designate a specific line number (record) from which to display the interchange or batch details. You can use this field as a browsing feature to further specify your display by typing a number in the field and pressing **Enter**. This displays details for that line and the next 10 lines. Entering a value of 999999 in the field displays the *last* lines of the interchange or batch.

**Batch Id:** (Protected)

Displays either the system-generated outbound interchange number or the inbound Batch ID for which you want to view data details. The outbound interchange number or inbound Batch ID is displayed if you have navigated from another screen.

**Nbr Blocks/Records:** (Protected)

A 9-position numeric field that displays the number of records or blocks for this batch.

**SNA/BSC/FTP:** (Inbound only) (Protected)

This field indicates which protocol was used during the collection of a batch from a remote site.

**A (Action Code):** (Optional)

A 1-position alphabetic field that indicates the action you want to perform for a particular data record. See the Screen Actions table previously in this section for the valid action codes for this screen and information on performing the actions.

**(Data Display):** (Protected)

Displays first 73 characters of up to 10 data records stored on the communication data queues.

## EDIM403 – Interchange Line Detail Screen

### Purpose

The Interchange Line Detail screen enables you to view the individual data records on the communications data queues.

### How to Access

You can access the Interchange Line Detail screen from the Interchange Detail screen by placing an S in the A (Action Code) field next to the record for which you want to view detail, then press PF5.

### Screen Example

The following illustrates the Interchange Line Detail screen for Inbound Character mode.

```

EDIM403 _____ INTERCHANGE LINE DETAIL          XXX      06/01/2011
                                                    12:00:00

Mailbox Id.....: TESTFTP_                Inbound/Outbound...: I
Batch Number.....: 0000340                Line Number.....: 000001
Batch Id.....: FTP TUTORIAL                Nbr Blocks/Records: 000000001
                                           SNA/BSC/FTP.....: FTP

ISA*00*          *00*          *ZZ*5136666666      *ZZ*6147937000      *010105*
120

Enter PF1=Help PF2=Hex      PF3=Exit PF4=IntchgDtl          PF6=Nxt
      PF7=Bwd  PF8=Fwd

```





**Inbound/Outbound:** (Protected)

A 1-position alphabetic field used to designate whether an inbound or outbound batch is displayed. Valid values are:

I	=	Displays inbound batch line details
P	=	Displays outbound batch line details

**Batch Number:** (Optional)

A 7-position numeric field. The value entered in the field sets the display to begin with the batch whose number is greater than or equal to the value entered. This batch number is the same batch number used by Sterling Connect.

**Line Number:** (Optional)

A 6-position numeric field used to designate a specific line number (record) from which to display the interchange or batch details. You can use this field as a browsing feature to further specify your display by typing a number in the field and pressing **Enter**. This displays details for that specific line. Entering a value of 999999 displays the details of the *last* line in the interchange or batch. If you have navigated from the Interchange Detail screen, where you must select a line number, the line number displays in this field. If you have navigated from the menu, the value in this field is the default line number 000001.

**Batch Id:** (Protected)

Displays either the system-generated outbound interchange number or the sequential, system-generated inbound batch ID for which you want to view details for a particular line.

**Nbr Blocks/Records:** (Protected)

A 9-position numeric field that displays the number of records or blocks for this batch.

**SNA/BSC/FTP:** (Inbound only) (Protected)

This field indicates which protocol was used during the collection of a batch from a remote site.

**(Data Display):** (Protected)

In “Character” mode, for both inbound and outbound, the screen will display up to 8 lines of 77 bytes each for a total of 616 bytes. In “Hex” mode:

- Outbound will only display ONE screen of 192 bytes.
- Inbound will display up to THREE screens of 192 bytes for a total of 576 bytes.





# Report Descriptions

This chapter provides a description of the reports produced by Sterling Gentran:Viewpoint.

This chapter contains the following topics:

<b>Topic</b>	<b>Page</b>
Reporting Structure .....	6-2
User Reports .....	6-3
Report Examples .....	6-4

## Reporting Structure

Sterling Gentran:Viewpoint has reporting capabilities for both operational activities and management reporting. The Sterling Gentran:Viewpoint reports provide a detailed account of all information you require at both the summary level and detail level.

<b>SUMMARY REPORT</b>	<p>The Summary report</p> <ul style="list-style-type: none"> <li>contains run options and process counts.</li> <li>provides first-level verification of Sterling Gentran:Viewpoint program processing.</li> <li>is generated by all Sterling Gentran:Viewpoint batch programs.</li> </ul>
<b>PROCESSING LOG</b>	<p>The Processing log</p> <ul style="list-style-type: none"> <li>contains program start and end times, and any severe or fatal conditions. A severe or fatal condition is a condition that caused the program to terminate before successful completion.</li> <li>provides second-level verification of Sterling Gentran:Viewpoint program processing.</li> <li>is generated by all Sterling Gentran:Viewpoint batch programs.</li> </ul>
<b>USER REPORT</b>	<p>User reports</p> <ul style="list-style-type: none"> <li>provide both operational and business information. User report information may be requested at the Status-level and/or Detail-level. For detailed information regarding User reports setup and requests, refer to “EDIM609 - Maintenance/ Inquiry Options Definition Screen” in Chapter 5, “Screen Descriptions”.</li> <li>provides a Report-Level field on the Maintenance/ Inquiry Options Definition Screen to specify the level of User report to be generated.</li> </ul> <p>The following levels of User Reports are available:</p> <ul style="list-style-type: none"> <li><b>Status:</b> provides a summary list of all objects that match the specified selection criteria.</li> <li><b>Detail:</b> provides detailed information for each object that matches the specified selection criteria (Repository Only).</li> <li><b>Both:</b> generates both Status and Detail-level reports. (Repository only).</li> <li><b>None:</b> generates no User reports.</li> </ul>

### User Reports

To generate User reports, you must run the batch program Maintenance/Inquiry (EDIN140).

See the “Batch Program Descriptions” chapter in the *IBM® Sterling Gentran:Viewpoint® for z/OS® Release 6.6 Technical Reference Guide* for complete details on the use of this program.

Sterling Gentran:Viewpoint provides User reports for the following information:

- Sterling Gentran:Viewpoint Profiles
- Sterling Gentran:Viewpoint Repository

PROFILES REPORTING	User Reports for Profiles may be requested at the <b>Status</b> report level only. They provide inquiry reporting and maintenance based on selection criteria.  Refer to the “EDIM609 – Maintenance/Inquiry Options Definition Screen” in Chapter 5, “Screen Descriptions” for details about the selection criteria options available for Profiles reporting.
REPOSITORY REPORTING	Sterling Gentran:Viewpoint provides both maintenance and inquiry reporting for the Repository. <ul style="list-style-type: none"><li>• Maintenance reporting is provided for programs where a mode of purge, archive, or restore has been requested.</li><li>• Inquiry reporting is provided for programs where a mode of inquiry has been requested.</li></ul> You may request <b>Status</b> -level and <b>Detail</b> -level reporting for Repository User Reports.  Refer to the “EDIM609 – Maintenance/Inquiry Options Definition Screen” in Chapter 5, “Screen Descriptions” for details about the selection criteria options available for Sterling Gentran:Viewpoint Repository reporting.

## Report Examples

### Purpose

This section contains examples of the following Sterling Gentran:Viewpoint reports:

- Maintenance/Inquiry Processing Summary report
- Repository Status-Level User report - Exceptions
- Repository Status-Level User report - Recipients
- Repository Detail-Level User report
- Profiles Status-Level User report

### Tracking Management only

- Maintenance/Inquiry Processing Summary report
- Repository Detail-Level User report
- Repository Status-Level User report
- Profiles Status-Level User report



## Repository Status-Level User Report – Recipients

```

REPORT DATE: 06/01/2011                GENTRAN:VIEWPOINT                PAGE   : 00001
REPORT TIME: 12:00:00                MAINTENANCE/INQUIRY EXCEPTION MANAGEMENT
REPORT ID   : EDI160                  REPOSITORY INQUIRY STATUS REPORT        VERSION: 6.6

RECIPIENT NAME  DESCRIPTION                                LAST ACTIVITY
DATE            TIME

@ACKREC         ACKNOWLEDGEMENT RECONCILIATION ERRORS     06/01/2011 12:00

```

## Repository Detail-Level User Report – Partner/Qualifier mode

```

REPORT DATE: 06/01/2011                GENTRAN:VIEWPOINT                PAGE   : 00001
REPORT TIME: 12:00:00                MAINTENANCE/INQUIRY EXCEPTION MANAGEMENT
REPORT ID   : EDI156                  REPOSITORY INQUIRY DETAIL REPORT        VERSION: 6.6

RECIPIENT  DESCRIPTION

@ACKREC    ACKNOWLEDGEMENT RECONCILIATION ERRORS

*SYSTEM/PROCESS: GENTRAN /EDID510 06/01/2011 - 12:00          EXCEPTION STATUS: OPEN
USER REFERENCE:                                               EXCEPTION TAG: 0000000010
EDI ENVELOPE  : INTERCHANGE: 000000001      GROUP: 000000002      TRANS:
DIRECTION/SET : OUTBOUND/

PARTNER . . . : VENDOR-1                                APPLICATION:          EXCP. ACTION:
PARTNER QUAL. :                                         NETWORK      :          ACTION DT-TM:

CAPTURE ID   : @MODEL-AR      CAPTURE ACKNOWLEDGEMENTS NOT ACCEPTED

```

## Repository Detail-Level User Report – Relationship mode

```

REPORT DATE: 06/01/2011                GENTRAN:VIEWPOINT                PAGE   : 00001
REPORT TIME: 12:00:00                MAINTENANCE/INQUIRY EXCEPTION MANAGEMENT
REPORT ID   : EDI156                  REPOSITORY INQUIRY DETAIL REPORT        VERSION: 6.6

RECIPIENT  DESCRIPTION

@ACKREC    ACKNOWLEDGEMENT RECONCILIATION ERRORS

*SYSTEM/PROCESS: GENTRAN /EDID510 06/01/2011 - 12:00          EXCEPTION STATUS: OPEN
USER REFERENCE:                                               EXCEPTION TAG: 0000000010
EDI ENVELOPE  : INTERCHANGE: 000000001      GROUP: 000000002      TRANS:
DIRECTION/SET : OUTBOUND/

USER . . . . : VENDOR-1                                APPLICATION:          EXCP. ACTION:
PARTNER . . . :                                         NETWORK      :          ACTION DT-TM:

CAPTURE ID   : @MODEL-AR      CAPTURE ACKNOWLEDGEMENTS NOT ACCEPTED

```

### Profiles Status-Level User Report

REPORT DATE: 06/01/2011	GENTRAN:VIEWPOINT	PAGE : 00001
REPORT TIME: 12:00:00	MAINTENANCE/INQUIRY EXCEPTION MANAGEMENT	
REPORT ID : EDI157	PROFILE INQUIRY STATUS REPORT	VERSION: 6.6

TYPE	NAME	DESCRIPTION
EXCEPTION ACTION	@MODEL-FAX	GENERAL FAX EXAMPLE
EXCEPTION CAPTURE	@MODEL-IE	INBOUND COMPLIANCE ERRORS
EXCEPTION CAPTURE	@MODEL-IM	INBOUND MAPPING ERRORS
EXCEPTION CAPTURE	@MODEL-OM	OUTBOUND MAPPING ERRORS
EXCEPTION CAPTURE	@MODEL-AR	CAPTURE ACKNOWLEDGEMENTS NOT ACCEPTED
EXCEPTION PROFILE	@MODEL-AR	ACKNOWLEDGEMENT ERRORS
EXCEPTION PROFILE	@MODEL-IE	INBOUND COMPLIANCE ERRORS
EXCEPTION PROFILE	@MODEL-IM	INBOUND MAPPING ERRORS
EXCEPTION PROFILE	@MODEL-OM	OUTBOUND MAPPING ERRORS

### Maintenance/Inquiry Processing Summary Report

REPORT DATE: 06/01/2011	GENTRAN:VIEWPOINT	PAGE : 00001
REPORT TIME: 12:00:00	MAINTENANCE/INQUIRY	
REPORT ID : EDI154	SUMMARY REPORT	VERSION: 6.6

OPTIONS USED THIS RUN  
-----

REQUESTED-OPERATION	=	PROCESS
DEFINITION	=	@MODEL-TP
CLASS	=	TRACKING
MODE	=	INQUIRY
FILE	=	PROFILE
REPORT LEVEL	=	STATUS

FIELD	OPERATOR	VALUE
CONNECTOR		
QUERY ID	EQ	ALL

PROCESSING SUMMARY  
-----

QUERY DEFINITIONS ON FILE	:	2
QUERY DEFINITIONS SELECTED	:	2
TOTAL ENTRIES SELECTED	:	2
NUMBER OF ERRORS THIS RUN	:	0
HIGHEST RETURN CODE THIS RUN	:	0

## Repository Detail-Level User report – Partner/Qualifier mode

```

REPORT DATE: 06/01/2011                GENTRAN:VIEWPOINT                PAGE   : 00001
REPORT TIME: 12:00:00                  MAINTENANCE/INQUIRY TRACKING MANAGEMENT
REPORT ID   : EDI158                   REPOSITORY INQUIRY DETAIL REPORT        VERSION: 6.6

*SYSTEM/PROCESS: @POSYSTEM /VPOBAPPL 06/01/2011 - 12:00  ITEM TYPE: U:ORDER      TRACE ID       : BB00000003
USER REFERENCE: PONUMBER-057          ACKNOWLEDGEMENT :
DIRECTION/SET : /850                   DIVISION       :
PROC STATUS 1 : OK                     PROC STATUS 2  : ORDER GOOD          PROC STATUS 3  : EXCEEDED
USER FIELD 1  : 110190                 USER FIELD 2  : 111590              USER FIELD 3  : 614-793-70
PARTNER . . . : VENDOR-2              APPLICATION    : POFILE                COMPLIANCE STATUS:
PARTNER QUAL. :                       NETWORK        :                       NETWORK STATUS :

*SYSTEM/PROCESS: GENTRAN /EBDI042 06/01/2011 - 12:00  ITEM TYPE: DOCUMENT      TRACE ID       : BB00000003
USER REFERENCE: PONUMBER-057          ACKNOWLEDGEMENT :
EDI ENVELOPE  : INTERCHANGE:          GROUP:           TRANS:
DIRECTION/SET : OUTBOUND/             DIVISION        : 000                DUPLICATE IND  : N

PARTNER . . . : VENDOR-2              APPLICATION    : POFILE                COMPLIANCE STATUS:
PARTNER QUAL. :                       NETWORK        :                       NETWORK STATUS :

*SYSTEM/PROCESS: @POSYSTEM /VPOBAPPL 06/01/2011 - 12:00  ITEM TYPE: U:ORDER      TRACE ID       : BB00000004
USER REFERENCE: PONUMBER-058          ACKNOWLEDGEMENT :
DIRECTION/SET : OUTBOUND/850          DIVISION       :
PROC STATUS 1 : OK                     PROC STATUS 2  : ORDER GOOD          PROC STATUS 3  : EXCEEDED
USER FIELD 1  : 110190                 USER FIELD 2  : 111090              USER FIELD 3  : 614-793-70
PARTNER . . . : VENDOR-2              APPLICATION    : POFILE                COMPLIANCE STATUS:
PARTNER QUAL. :                       NETWORK        :                       NETWORK STATUS :

*SYSTEM/PROCESS: GENTRAN /EBDI042 06/01/2011 - 12:00  ITEM TYPE: DOCUMENT      TRACE ID       : BB00000004
USER REFERENCE: PONUMBER-058          ACKNOWLEDGEMENT :
EDI ENVELOPE  : INTERCHANGE:          GROUP:           TRANS:
DIRECTION/SET : OUTBOUND/             DIVISION        : 000                DUPLICATE IND  : N

PARTNER . . . : VENDOR-2              APPLICATION    : POFILE                COMPLIANCE STATUS:
PARTNER QUAL. :                       NETWORK        :                       NETWORK STATUS :

```



## Report Examples

### Repository Detail-Level User report – Relationship mode

```
REPORT DATE: 06/01/2011                GENTRAN:VIEWPOINT                PAGE   : 00001
REPORT TIME: 12:00:00                  MAINTENANCE/INQUIRY TRACKING MANAGEMENT
REPORT ID  : EDI158                     REPOSITORY INQUIRY DETAIL REPORT    VERSION: 6.6

*SYSTEM/PROCESS: @POSYSTEM /VPOBAPPL 06/01/2011 - 12:00  ITEM TYPE: U:ORDER      TRACE ID      : BB00000003
USER REFERENCE: PONUMBER-057              ACKNOWLEDGEMENT :
DIRECTION/SET : /850                      DIVISION      :
PROC STATUS 1 : OK                        PROC STATUS 2 : ORDER GOOD      PROC STATUS 3 : EXCEEDED
USER FIELD 1  : 110190                    USER FIELD 2  : 111590          USER FIELD 3  : 614-793-70
USER . . . . : VENDOR-2                  APPLICATION   : POFILE              COMPLIANCE STATUS:
PARTNER . . . :                          NETWORK       :
NETWORK STATUS :

*SYSTEM/PROCESS: GENTRAN /EBDI042 06/01/2011 - 12:00  ITEM TYPE: DOCUMENT      TRACE ID      : BB00000003
USER REFERENCE: PONUMBER-057              ACKNOWLEDGEMENT :
EDI ENVELOPE  : INTERCHANGE:              GROUP:
DIRECTION/SET : OUTBOUND/                 DIVISION      : 000              TRANS:
NETWORK STATUS :                          DUPLICATE IND : N

USER . . . . : VENDOR-2                  APPLICATION   : POFILE              COMPLIANCE STATUS:
PARTNER . . . :                          NETWORK       :
NETWORK STATUS :

*SYSTEM/PROCESS: @POSYSTEM /VPOBAPPL 06/01/2011 - 12:00  ITEM TYPE: U:ORDER      TRACE ID      : BB00000004
USER REFERENCE: PONUMBER-058              ACKNOWLEDGEMENT :
DIRECTION/SET : OUTBOUND/850              DIVISION      :
PROC STATUS 1 : OK                        PROC STATUS 2 : ORDER GOOD      PROC STATUS 3 : EXCEEDED
USER FIELD 1  : 110190                    USER FIELD 2  : 111090          USER FIELD 3  : 614-793-70
USER . . . . : VENDOR-2                  APPLICATION   : POFILE              COMPLIANCE STATUS:
PARTNER . . . :                          NETWORK       :
NETWORK STATUS :

*SYSTEM/PROCESS: GENTRAN /EBDI042 06/01/2011 - 12:00  ITEM TYPE: DOCUMENT      TRACE ID      : BB00000004
USER REFERENCE: PONUMBER-058              ACKNOWLEDGEMENT :
EDI ENVELOPE  : INTERCHANGE:              GROUP:
DIRECTION/SET : OUTBOUND/                 DIVISION      : 000              TRANS:
NETWORK STATUS :                          DUPLICATE IND : N

USER . . . . : VENDOR-2                  APPLICATION   : POFILE              COMPLIANCE STATUS:
PARTNER . . . :                          NETWORK       :
NETWORK STATUS :
```

### Repository Status-Level User Report

```
REPORT DATE: 06/01/2011                GENTRAN:VIEWPOINT                PAGE   : 00001
REPORT TIME: 12:00:00                  MAINTENANCE/INQUIRY TRACKING MANAGEMENT
REPORT ID  : EDI159                     REPOSITORY INQUIRY STATUS REPORT    VERSION: 6.6

TRACE ID  ITEM TYPE      SYSTEM  PROCESS  DATE      TIME  REFERENCE
BB00000003 U:ORDER      @POSYSTEM VPOBAPPL 06/01/2011 12:00 PONUMBER-057
BB00000003 DOCUMENT    GENTRAN   EBDI042 06/01/2011 12:00 PONUMBER-057
BB00000004 U:ORDER      @POSYSTEM VPOBAPPL 06/01/2011 12:00 PONUMBER-058
BB00000004 DOCUMENT    GENTRAN   EBDI042 06/01/2011 12:00 PONUMBER-058
OE00000006 FUNCTIONAL GROUP GENTRAN   EBDI002 06/01/2011 12:00
OE00000006 FUNCTIONAL GROUP GENTRAN   EDID205 06/01/2011 12:00
OE00000006 FUNCTIONAL GROUP GENTRAN   EDID510 06/01/2011 12:00
OE00000008 INTERCHANGE  GENTRAN   EBDI002 06/01/2011 12:00
OE00000008 INTERCHANGE  GENTRAN   EDID205 06/01/2011 12:00
```



## Jump Codes

The following table lists the jump codes for the Sterling Gentran:Viewpoint screens. The screens are listed by screen number within the subsystem.

Screen Number	Screen Title	Numeric Jump Codes	Alphabetic Jump Codes
EDIM600	Viewpoint Main Menu	9 9.0	VP
<b>System Options Screens</b>			
EDIM685	System Options	9.1	VP.SYS
EDIM686	Staging TSQ Directory	9.1.8	VP.TSQ
<b>Extended System Management Screens</b>			
EDIM601	Extended System Management Menu	9.2	VP.EXT
EDIM602	Sterling Tracking Point Directory	9.2.1	VP.STPDIR
EDIM603	Sterling Tracking Point Definition	9.2.2	VP.STPDEF
EDIM607	Functional Area Control	9.2.3	VP.FUNC
EDIM608	Maintenance/Inquiry Options Directory	9.2.4	VP.MNTDIR
EDIM609	Maintenance/Inquiry Options Definition	9.2.5	VP.MNTDEF
EDIM610	User Tracking Point Directory	9.2.6	VP.UTPDIR
EDIM611	User Tracking Point Definition	9.2.7	VP.UTPDEF
<b>Exception Management Screens</b>			
EDIM620	Exception Management Menu	9.3	VP.EXCP
EDIM621	Exception Profile Directory	9.3.1	VP.PROFDIR
EDIM622	Exception Profile Definition	9.3.2	VP.PROFDEF
EDIM623	Exception Capture Directory	9.3.3	VP.CAPDIR
EDIM624	Exception Capture Definition	9.3.4	VP.CAPDEF
EDIM625	Exception Action Directory	9.3.5	VP.ACTDIR
EDIM626	Exception Action Definition	9.3.6	VP.ACTDEF

<b>Screen Number</b>	<b>Screen Title</b>	<b>Numeric Jump Codes</b>	<b>Alphabetic Jump Codes</b>
<b>Exception Management Screens (Continued)</b>			
EDIM627	User Message Directory	9.3.7	VP.MSGDIR
EDIM628	User Message Definition	9.3.8	VP.MSGDEF
EDIM629	User Procedure Directory	9.3.9	VP.PROCDIR
EDIM630	User Procedure Definition	9.3.10	VP.PROCDEF
EDIM631	Usage Cross Reference	9.3.11	VP.USAGE
<b>Exception Inquiry Screens</b>			
EDIM645	Exception Inquiry Menu	9.4	VP.INQ
EDIM646	Recipient Directory	9.4.1	VP.RECPDIR VP.RECDIR
EDIM648	Exception List	9.4.2	VP.EXCPLST
<b>Tracking Management Screens</b>			
EDIM700	Tracking Management Menu	9.5	VP.TM
EDIM701	Query Directory	9.5.1	VP.QDIR
EDIM702	Query Request	9.5.2	VP.QREQ
<b>Log Display Screens</b>			
EDIM688	Online Log Display	9.99	VP.LOG

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# Glossary

**Definition**

A set of options you may create, save, and reuse. Definitions allow you to easily and selectively build your Extended EDI System and Profiles from a wide range of criteria.

You can create the following types of definitions:

- Tracking Point
- Maintenance/Inquiry Options
- Exception Profile
- Exception Capture
- Exception Action
- User Message
- User Procedure

**Error User Exit**

A user program initiated by Sterling Gentran:Viewpoint in a fatal system condition.

**Exception**

An event or combination of events that resulted from a process for which you want some action to be performed. An exception is not restricted to an error condition. For example, a simple exception could be a purchase order that has just been received from partner XYZ.

**Exception Capture Definition**

The set of user defined options used by Sterling Gentran:Viewpoint in an Exception Profile to capture exceptions being processed by tracking points.

**Exception Action Definition**

The set of user defined options used by Sterling Gentran:Viewpoint in an Exception Profile to initiate user automated systems for responding to captured exceptions.

**Exception Inquiry**

A functional area that provides the online functions to manage and resolve captured exceptions.

**Exception Management**

An option from the Sterling Gentran:Viewpoint Main Menu that provides the online functions to define definitions, profiles, user messages, and user procedures.

**Exception Profile**

A profile that combines a capture definition and recipient, and optionally a user message, a user procedure, and an exception action. Sterling Gentran:Viewpoint uses the exception profile to automate the handling of an exception for the user.

**Extended Search Conditions**

For queries that cannot be performed using the basic query criteria, this feature allows you to extend the search condition up to a 7-expression condition with full boolean logic and AND/OR connectors.

**Extended System Management**

An option from the Sterling Gentran:Viewpoint Main Menu that provides the online functions you need to define and administer the Extended EDI System.

**Find Limit**

A 1- to 6-digit number set by the user on the Configuration File Sterling Gentran:Viewpoint record. This number limits the number of items the search function will find to satisfy the search criteria before terminating the search.

**Gateway**

An Application Program Interface (API) that provides Tracking Points access to Sterling Gentran:Viewpoint.

**Item**

Term used by Sterling Gentran:Viewpoint to refer to a logical grouping of data and information.

The item types currently recognized by Sterling Gentran:Viewpoint are:

- Application Document
- Batch (Sterling Gentran:Plus only)
- Interchange
- Functional Group
- Run
- Transaction Set
- U:[type] (Tracking Management only)

**Object Selection Field**

Most screens provide fields at the top of the screen for selecting the object or objects on which you wish to work. These fields are called Object Selection fields.

**Process Status**

The status associated with an item passed from a user application to Sterling Gentran:Viewpoint Tracking Management.

**Query ID**

The name you define for a set of search criteria by which you may create, save, and reuse. The search query finds items that have been processed by Tracking Management using preset criteria. The criteria available for a basic query are Item Type, Reference, Partner, and Date/Time.

**Recipient**

Any person or group that receives notification for an exception captured by Sterling Gentran:Viewpoint.

**Search Limit**

A 1- to 6-digit number set by the user on the Configuration File Sterling Gentran:Viewpoint record. This limits the number of items the Query search function will evaluate before terminating the search.

**Trace ID**

A unique number assigned to each item being tracked by Tracking Management. The trace ID provides a link for an item between processes and also provides a means to reference the item.

**Tracking Management**

A functional area that provides end-to-end tracking of an item travelling through the Extended EDI system.

**Tracking Point**

A system/process that has been included in your Extended EDI System (for example, Sterling Gentran Outbound Mapper).

**Tracking User Exit**

Allows you to pass information to your database for subsequent inquiry. This feature can be optionally invoked by Tracking Management when an item has been processed for a tracking point.

**User Action**

A user batch procedure or online transaction that you have defined to Sterling Gentran:Viewpoint as an Exception Action. The User Action is automatically initiated by Sterling Gentran:Viewpoint Profiles. An example of a User Action is E-Mail. The user may define, in an Exception Profile, that a person should receive an E-Mail when errors are encountered for a purchase order received.

**User Field**

Any value you pass to Sterling Gentran:Viewpoint for an item by a User tracking Point. You assign the name or label used for the User Field 1 field when you define the User Tracking Point in Extended System Management. Three User Fields may be passed for each item for each process.

**User Tracking Point**

User system and/or processes such as applications or communications systems that invoke the User Gateway to pass information to Sterling Gentran:Viewpoint. This feature is currently available for Tracking Management only.



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