Volume

3.8

INTERNATIONAL ELECTRONIC BUSINESS III, INC.

Simple EDI Integration

User Manual

Table of Contents

IEB3'S NEW EDI EXPERIENCE 4

MENUS 5

'TOP MENU BAR' 5
'USER DROP DOWN MENU' 6

TRACKING 7

RIGHT CLICK MENU 8
Details 8
Input/Source 8
Simple XML 8
Output/Target 8
Message 8
Related 8
Partner Profile 8
Partner Transactions 9
Resend 9
Reprocess EDI 9
Reprocess Canonical 9
Mark Acknowledged 9
Mark Completed 10
Return Transactions 10
Pattern Adjustment 10
Promote to Prod 10

DATA FLOW DIAGRAM, FAILURE AND PROCESS POINTS 11

PATTERN ADJUSTMENT 12

Chapter

1

IEB3's New EDI Experience

… growing your business.

Simple EDI Integration

Daily: Track activity by logging in to your IEB3 account. This will land you on the production Tracking page with most recent transactions on top, quickly glance over what has happened, no issues, perfect. Check back throughout the day. Your daily experience will be, taking care of business, not worrying about EDI.

How to add a new partner? Request they send a test Purchase Order. When we receive it, we will *automatically* setup the partner transaction and create new pattern keys for Purchase Order in test. Then you can right click on the Purchase Oder in Tracking to instantly setup and simulate *Return Transactions*; PO Response, ASN or Invoice. We will actually send structurally correct return transactions the partner can validate. Test until perfect. When ready; 'Promote to Prod', again, via our Tracking page right click menu. No onboarding can be more simple.

Resolving issues in test or rarely in production will be quickly accomplished through our Tracking page with its powerful right click menu. IEB3 support will assist you as needed. Your EDI experience is greatly enhanced by simple systems and powerful operational tools.

However, this is not what the EDI companies of the last half century experienced. They require software development projects lasting weeks and months as well as testing projects to add a new EDI partner (You!). They routinely experience errors requiring support teams. They have decades long backlogs of partners they cannot add or are not worth it (again you). Most likely, for a while all your EDI partners will be those who have been involved in EDI for decades. They will not be able to keep up. Our strategy for them is to tap into what they have already deployed as they deployed it. They are not agile or flexible. Any request for a tiny change will end your integration opportunity. They've been paying millions for decades to do complicated EDI and have lost patience. Why? A company cannot process millions of transactions a month with manual paper processing or the pathetic EDI replacements. IEB3 are agile and flexible, enabling you to integrate with them as they are and therefore tap into their profitable markets to grow your businesses. It will be difficult to feel their pain, just understand and ask for no changes.

Simple can be automated and run quiet.

We make EDI simple.

Enjoy the age of Integration!

Chapter

2

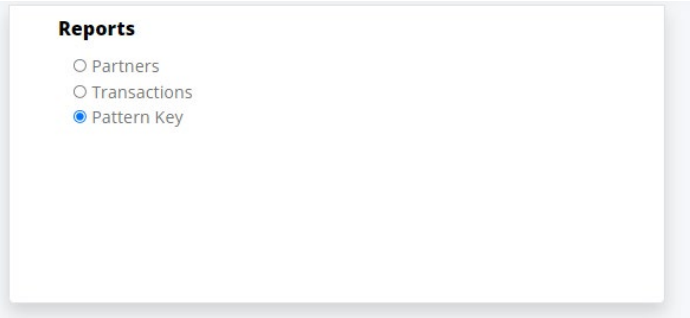
Menus

'Top Menu Bar'

Home
Takes user to IEB3 Corporate Web Site. *To get back use return arrow.*

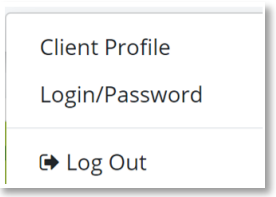
Contact
Takes user to IEB3 Corporate "Contact" page to communicate with us. *To get back use return arrow.*

Reports
The easiest way to see all your Partners and Transactions. More reports will be created as Clients request them. Most everything else can be seen with filters on our Tracking Page. *Stays on Client Site.*



Click the **IEB3 Logo** from anywhere on the Client Site to go to **'Tracking'**.

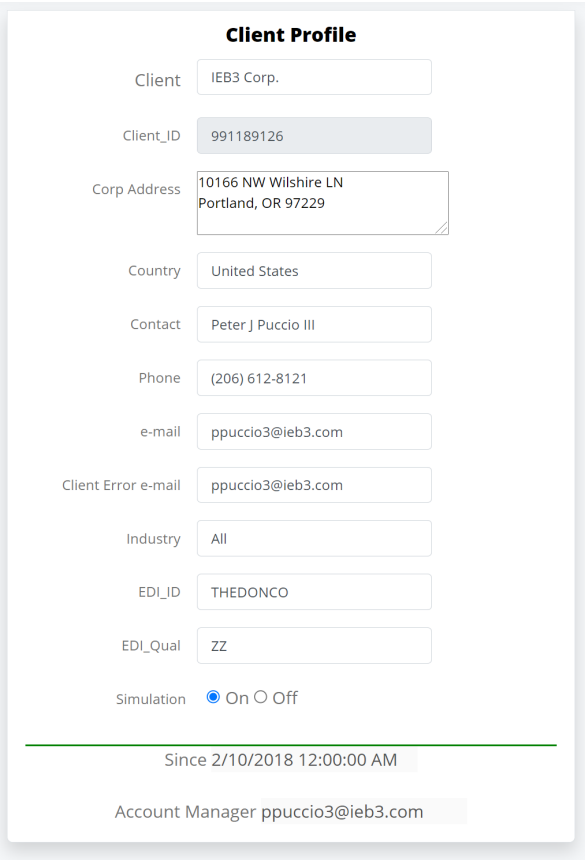
'User Drop Down Menu'



Client Profile

Displays and allows updates to your profile.

Make any desired changes and then click 'Submit'.
Click off the popup window to cancel or close.

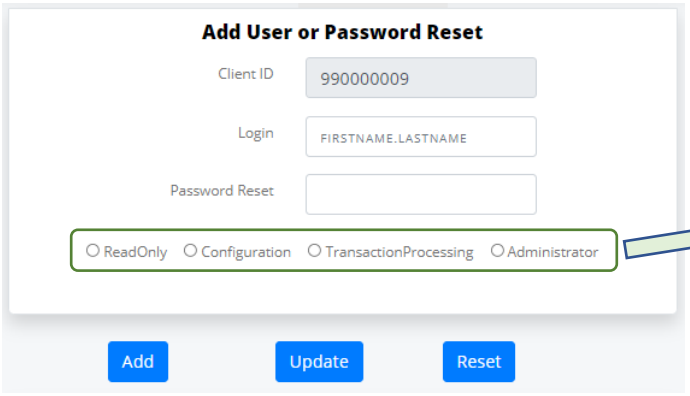


Log Out

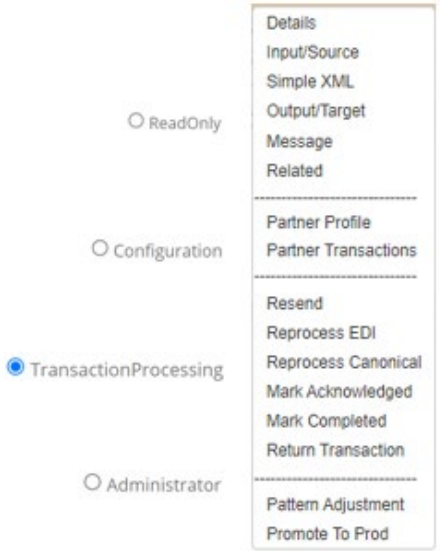
Logs out the current user.

Login/Password

Allows Clients to Add, Update or Reset their user's login and password. Clients have complete control. IEB3 can support you as you wish. Be sure to remember to set the security level appropriately.



The four logn security levels apply to the sections of our right click menu. User menus display only options their security level allows.



Chapter

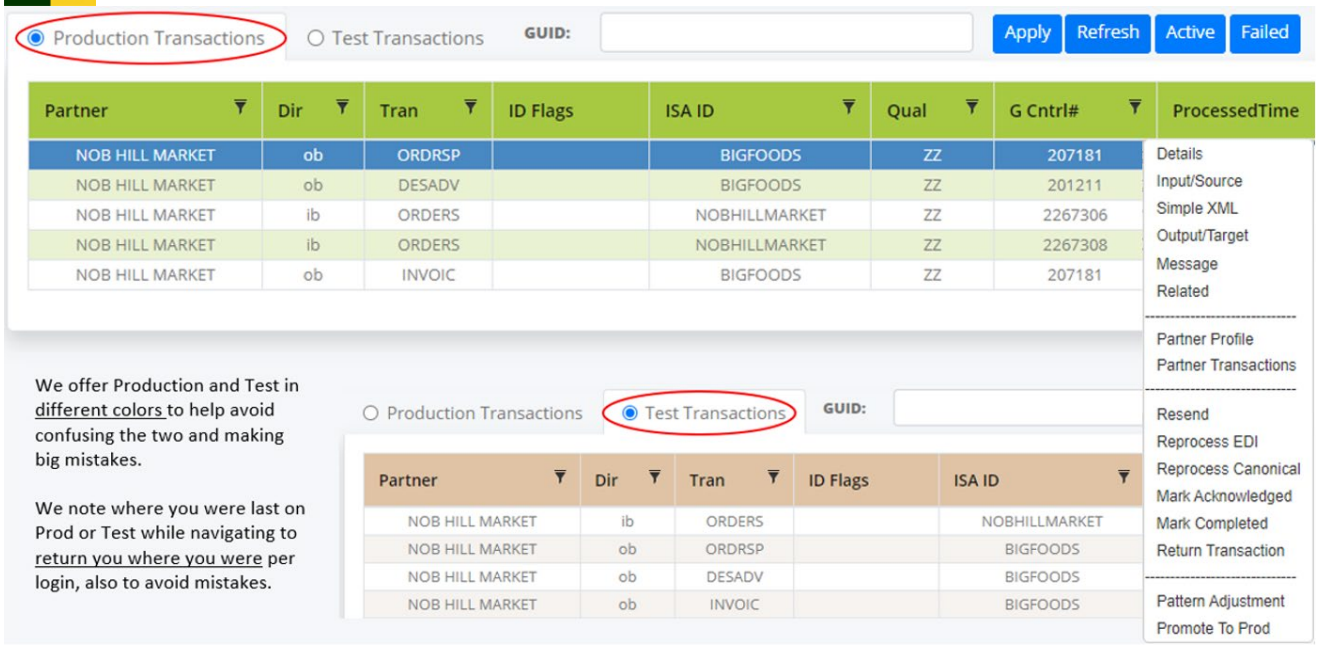
3

Tracking

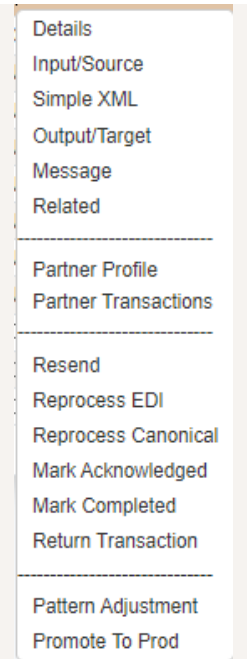
… is everything; tie it to processing and you have a going concern.

Transaction tracking provides our clients powerful control over their data. Comprehensive transaction tracking mixed with powerful operational tools is our approach to smooth operations. We show you all your EDI transactions, test, and production. You can quickly see all the details we see. To avoid confusing prod and test we use different colors and navigational consistency to avoid big mistakes.

Click on the **IEB3 Logo** from any page to get to our 'Tracking' pages, Prod and Test.



Filters help manage the transactions displayed. When you are looking for a certain partner transaction or a specific PO #, Invoice #, filters will help find them quickly. You enter any part of what you are looking for and click 'Apply Filter'. Click 'Refresh' to clear Filters and redisplay.



Right Click Menu

The current list of 'Right Click' functionality available to users with appropriate security levels on our production and test Tracking pages for any transaction.

The top section is view only. This will be available to 'read only' users. The middle section requires transaction processing. The bottom section is for technical users with understanding of EDI and our service.

Details Displays all the details we track on the transaction. Tracking shows a green check. Details shows status number 3, or complete. The meanings of these status numbers are described in Chapter 3. Detail's date is Greenwich Mean Time. Tracking date local time. We show you the detailed content from our SQL database, so you know everything we do.

Input/Source Displays the contents of the Input file in a popup window. Contents may be copied to clipboard via button. *Input* is EDI data on inbound transactions and ERP application data outbound. Having the input, canonical and output this visible and accessible is an extreme advantage for support. This allows support to easily take the input to test and research solutions. Remember, we simulate return transactions, so there will be no input file to display.

Simple XML Display the contents of our simple canonical XML file. Contents may be copied to clipboard via button. The SimpleXML file is always SimpleXML, regardless of direction. We've added support for json.

Output/Target Displays the contents of the Output file in a popup window. Contents may be copied to clipboard via button. *Output* is EDI data on outbound transactions and ERP application data inbound. Output can be Simple XML or Simple JSON if the client manages their own ERP integration.

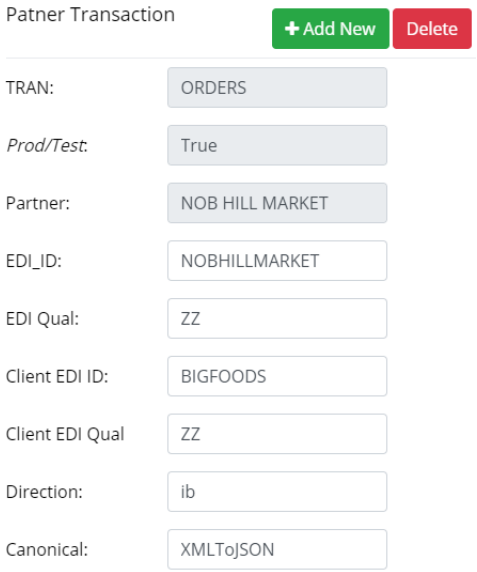
Message Displays the last message for the current transaction. This is also available in 'Details' but it is nice to be able to view separately as this is where we will find error messages on failures.

Related

Partner Profile Displays and allows update of the Partner's Configuration. Make any desired changes and click 'Submit.' Click anywhere off the popup window to cancel/close.

Partner Transactions Displays and allows updates to Partner Transactions. Make any desired updates and click 'Save'. Click 'Cancel' or anywhere off the popup window to cancel/close.

To see all Partner transactions, run the 'Transactions' report.



Canonical Conversion Examples

Partner to Client - Inbound EDI

- XMLToIDOC: Client receives IEB3's XML IDOCs
- XMLToCSV: Client receives IEB3's CSV format
- SimpleXML: Client receives IEB3's Simple XML
- XMLToJSON: Client receives IEB3's Simple JSON

Client to Partner - Outbound EDI

- IDOCToXML: Client sends IEB3's XML IDOCs
- CSVToXML: Client sends IEB3's CSV format
- SimpleXML: Client sends IEB3's Simple XML
- JSONToXML: Client sends IEB3's Simple JSON

See 'Canonical Conversions' in IEB III Client Knowledge Base. →

Resend Resends the output last sent as is without any changes. This is a pure simple resend and it is instant. When you click 'Resend' the file is sent immediately. There is no warning or "are you sure" prompt. The file is resent immediately.

Reprocess EDI Reprocesses the EDI portion of current transaction. Full processing follows so it will be resent. It is also instant. When you click 'Reprocess EDI' the data is re-translated and resent immediately. There is no warning or "are you sure" prompt. The file is reprocessed immediately. Remember that The EDI and Canonical portions of a transaction's processing are reversed by direction (see Ch. 4). These functions are the main reason I am taking measures to make it difficult to think you are on test when you are on production. The rows are different colors. I do not want anyone ever reprocessing data on production thinking they are on test.

Reprocess Canonical Reprocesses the Canonical portion of current transaction. Full processing follows so it will be resent. It is also instant. When you click 'Reprocess Canonical' the data is re-translated and resent immediately. There is no warning or "are you sure" prompt. The file is reprocessed immediately. Remember that The EDI and Canonical portions of a transaction's processing are reversed by direction (see Ch. 4). These functions are the main reason I am taking measures to make it difficult to think you are on test when you are on production. The rows are different colors. I do not want anyone ever reprocessing data on production thinking they are on test.

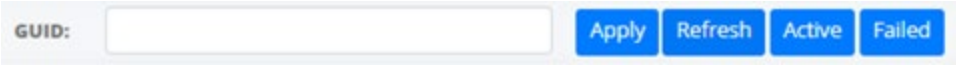
Mark Acknowledged Marks the current transaction acknowledged. This is for partners that say yes, they got it, they do not know why they did not send a 997 acknowledgement and they cannot send one now. They ask can you just mark it as acknowledged please? Most companies the answer is no. At IEB you just right click and 'Mark Acknowledged." This is also why I put the GS Control number on the Tracking screen. The GS Control number is used for x12 to acknowledge. So, if you have someone calling partners asking if they received unacknowledged transactions this is how they mark a transaction acknowledged manually.

Mark Completed Marks the current transaction complete. This means IEB will not process the transaction any further regardless of status. This is for transactions that may have failed but have been recovered and possibly by other than EDI. For example, the buyer enters the order manually. The transaction is no longer needed so we mark it complete. IEB3 systems will not process these transactions, however you can still 'Reprocess' them manually which removes the Completed flag.

Return Transactions When you right click on an inbound order on our test Tracking page and select 'Return Transactions' we make three copies of the inbound order's SimpleXML and modify / add details required for an Order Response, ASN and Invoice. We add carrier and ASN # to the ship notice, we add Invoice # and totals to the invoice etc. And process all three immediately. They also obviously match the inbound PO. New Partner Transactions are setup with newly created individual default pattern keys automatically. Therefore, pattern keys can be quickly adjusted individually without affecting any other partner transactions as needed. As well we know the canonical conversion integrations will work for each new partner automatically. This enables 'Return Transactions' testing without waiting for ERP/applications. Enjoy!

Pattern Adjustment Click to adjust the Pattern Key for this client, partner, and transaction. The Pattern Adjustment page will open with the appropriate Pattern Key. The source data for the transaction is available as well in Pattern Adjustment for convenience. It's very helpful to see the source data when making changes to its keys. When you click 'Save Key' or 'Save & Archive' it will save the proper Pattern Key. The user does not need to know the details of which one to modify, the software knows.

Promote to Prod Available only in Test. This will copy the Pattern Key from test to production as well as configure Partner Transactions for production properly, which is critical. Again, the user does not need to know which is moving where, the software knows and handles it properly. You can go to Partner Transactions to see the configuration and make needed changes.



Apply: Searches for the GUID entered to the left.

Refresh: Removes any previously applied filters and restores original display.

Active: Display only transactions that have less than three green checks. ✓ ✓ ✓

Failed: Display only rows with a red ✗ in 'Status'.

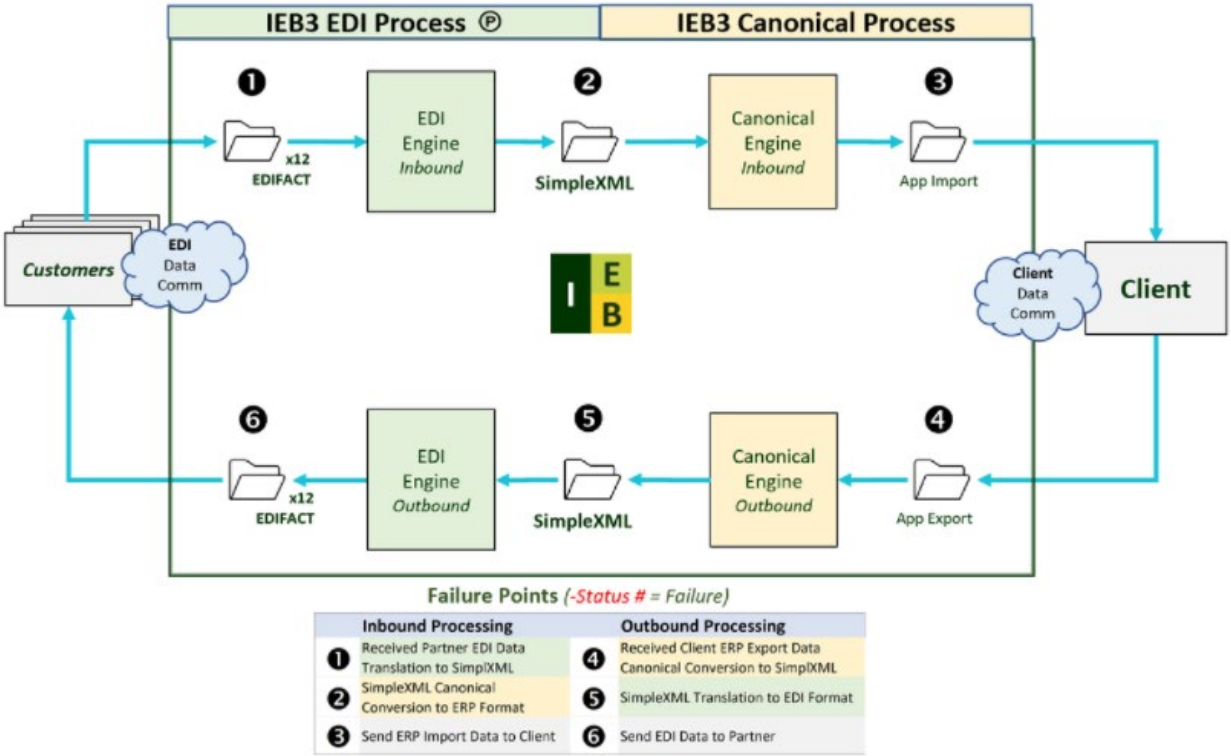
Chapter

4

Data Flow Diagram, Failure and Process Points

Process by number! "Step by Step, Easy as Pie, 1-2-3"

Below is our Dataflow Diagram, Failure Point Analysis and Process by Number system. As described below the top, left to right and 1-3, are "Inbound" data and process flow as well as failure points. This is *inbound* from the client perspective. Across the bottom, right to left and 4-6, are outbound data, process, and failure points. The quote in the Subtitle is Jamie Escalante, played by Edward Olmos in 'Stand and Deliver', explaining that calculus is easy, step by step. Our processing and failure point analysis is also easy. These are used and referred to everywhere. A failure will show a status, for example, of -2. This indicates a failure at processing point ❷ below, canonical conversion. It is a great advantage to know *where* a failure occurred.



IEB3 Data Flow, Process Points and Failure Points. Shows the EDI and Canonical process sides. Establishes numbers and colors for each process step that are used throughout the Support Guide as well. This is the master view of our system. Quite simple, really.

Chapter

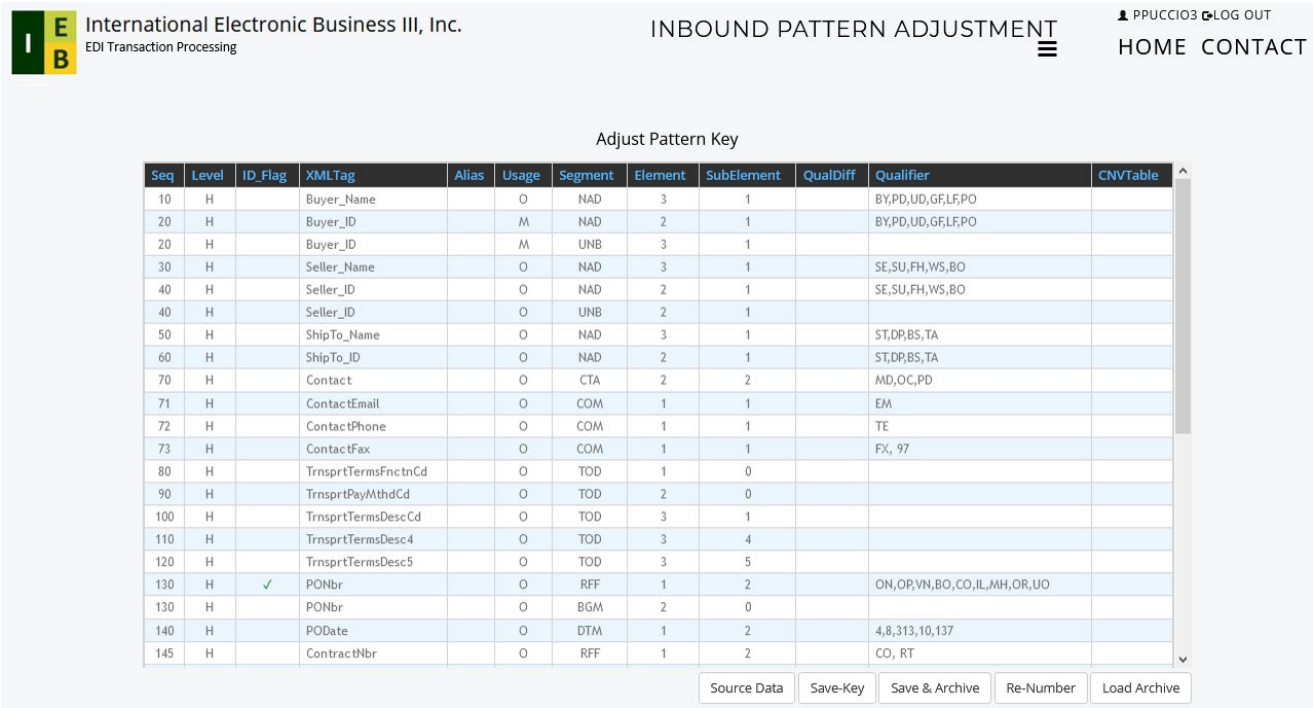
5

Pattern Adjustment

"One that would automate must have an override."...

Patterns are the key to our new EDI solution. We don't call them patterns just to not call it mapping. They are patterns and they are the key to everything simple about our solution. Developers no longer needed for EDI changes. IEB3 clients have full control of our Pattern Keys and Simple XML or JSON canonical content. We give you control of our canonical content and our pattern key methods.

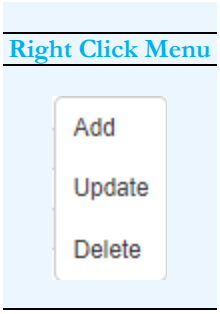
The pattern key example below is for an inbound purchase order. Clients do not create these, they adjust them. Pattern Adjustment is only available through our Tracking page right click menu based on the selected transaction.



Seq	Level	ID_Flag	XMLTag	Alias	Usage	Segment	Element	SubElement	QualDiff	Qualifier	CNVTable
10	H		Buyer_Name		O	NAD	3	1		BY,PD,UD,GF,LF,PO	
20	H		Buyer_ID		M	NAD	2	1		BY,PD,UD,GF,LF,PO	
20	H		Buyer_ID		M	UNB	3	1			
30	H		Seller_Name		O	NAD	3	1		SE,SU,FH,WS,BO	
40	H		Seller_ID		O	NAD	2	1		SE,SU,FH,WS,BO	
40	H		Seller_ID		O	UNB	2	1			
50	H		ShipTo_Name		O	NAD	3	1		ST,DP,BS,TA	
60	H		ShipTo_ID		O	NAD	2	1		ST,DP,BS,TA	
70	H		Contact		O	CTA	2	2		MD,OC,PD	
71	H		ContactEmail		O	COM	1	1		EM	
72	H		ContactPhone		O	COM	1	1		TE	
73	H		ContactFax		O	COM	1	1		FX, 97	
80	H		TrnsprtTermsFnctnCd		O	TOD	1	0			
90	H		TrnsprtPayMthdCd		O	TOD	2	0			
100	H		TrnsprtTermsDescCd		O	TOD	3	1			
110	H		TrnsprtTermsDesc4		O	TOD	3	4			
120	H		TrnsprtTermsDesc5		O	TOD	3	5			
130	H	✓	PONbr		O	RFF	1	2		ON,OP,VN,BO,CO,IL,MH,OR,UO	
130	H		PONbr		O	BGM	2	0			
140	H		PODate		O	DTM	1	2		4,8,313,10,137	
145	H		ContractNbr		O	RFF	1	2		CO, RT	

When you click 'Pattern Adjustment' we examine the transaction details from the selected row on our Tracking page and load up the appropriate pattern key as shown above. You can make the needed changes, save the pattern key, then reprocess the transaction and repeat until it processes as desired.

Right Click Menu



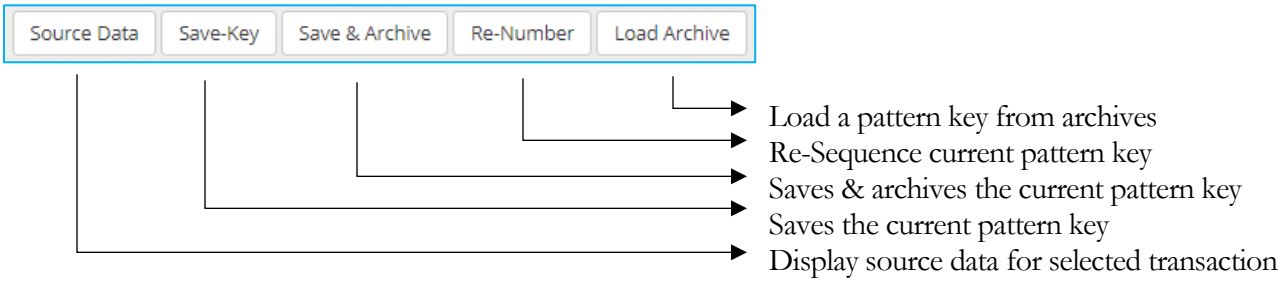
The right click menu provides three options; Add, Change and Delete which allow for any adjustments that may be needed. Update and Delete are simpler than Adding a row. It's easy to delete what you do not need. As well making a change to a qualifier is quite simple. However, to add a row one needs to understand EDI and our pattern key methods. IEB3 support will help and we'll provide training videos on our YouTube Channel.

Add

Creates a new row and therefore a new XML tag. This will open a new row of blanks to allow new content. Enter the required details and click 'Save' then test. Once it is as desired click 'Save & Archive'.

Update

To make needed adjustments. Right click on the field and enter the change. We do not allow changes to 'level' as it would enable fatal mistakes. Allowing a detail level in the header section, or vice versa, will cause failure. One must delete the row then add it to the proper section. There is no confirmation for updates, it writes the changes when you 'Save' the pattern key.

Delete

Removes unwanted rows/XML tags. You will be asked for confirmation.