Covisint Connect
User Guide

April 2008
Document Revision Level 3.1

Table Of Contents

PREREQUISITES

> (i) It is assumed that you:
>
> - have been approved and set up in the Connect application
> - use Internet Explorer version 6.0 + in order to view this online help
> - will have the appropriate roles assigned in order to complete role-based tasks

> (i) Always verify that the **profile** displayed in the upper right corner of the Connect screen is that in which you wish to perform administration.
>
> **Where is the Profile menu?**
>
> Located in the upper right corner of the toolbar.
>
> | Covisint Connect | ▸Home ▸Portal ▸Help ▸FAQ ▸Contact Us |
> |---|---|
> | Transactions : Trading Partners : Channels : Reports : Administration : Library | training example |
> | | Quick Search Search Transactions Recent Transactions Restore |
>
> If it is not, switch profiles to the targeted profile.
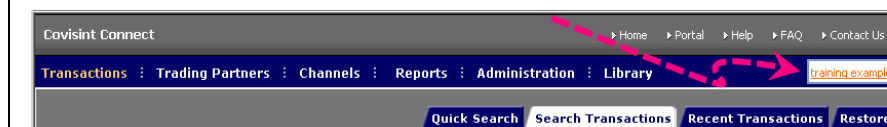
CONVENTIONS USED IN THIS SUPPORT MATERIAL	
Key in the name of the user, then press **OK**.	**Boldface** font designates a clicked button or option selection. (OK in this example).
Key in the *name of the user*, then press OK.	*Italicized* font indicates the type of information you should key into the open text field (user name in this example).
Select the *Document Types* for which the rule applies.	*Italicized, bold, and blue* colored font indicates that a definition of that word exists in the glossary. (Document Types in this example).
From the **Request Queue** tab of the Trading Partners screen, you are able to view all pending relationship requests.	**Bold, blue colored** font indicates that a graphical representation of the screen location of the item described below. (Request Queue in this example).
(i)	A tip or important note providing helpful hints, requirements, or other important notes.

LOGGING IN TO CONNECT

1. Navigate to www.covisint.com
2. Click **Automotive Login.**

> **Where is the Automotive Login button?**
>
> Automotive Login is located at the upper right corner of **www.covisint.com** portal.
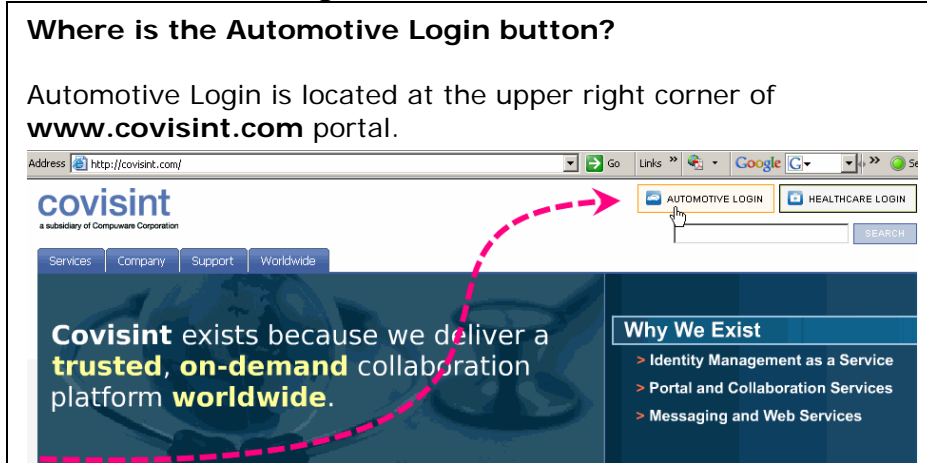
3. Key in your User ID and Password, then click **Submit**. The logged in Portal screen is displayed.
4. Click **Covisint Connect** from the Covisint Applications list. The Connect screen is displayed.
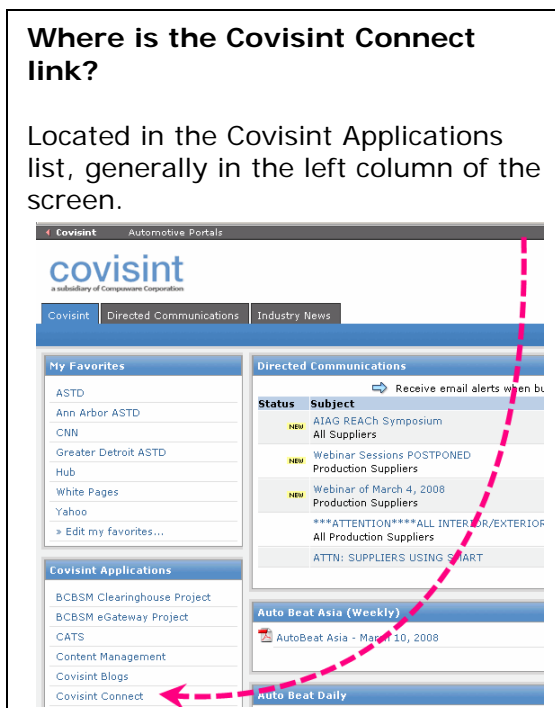
> **Where is the Covisint Connect link?**
>
> Located in the Covisint Applications list, generally in the left column of the screen.

Tasks are performed per **Trading Partner** Profile, and you may belong to more than one profile. Tasks only affect the current profile displayed. Verify that the **profile** displayed in the upper right corner of the screen is that in which you wish to perform administration.

Where is the Profile menu?

Located in the upper right corner of the toolbar.

Covisint Connect	▸Home ▸Portal ▸Help ▸FAQ ▸Contact Us
Transactions ⋮ Trading Partners ⋮ Channels ⋮ Reports ⋮ Administration ⋮ Library	training example
	Quick Search **Search Transactions** Recent Transactions Restore

If it is not, switch profiles to the targeted profile.

RESULT:

You have successfully logged in to Connect.

USER ROLES AND PRIVILEGES

Users of the Covisint Connect application must obtain one of the three roles available. These roles and associated privileges are defined as:

USER ROLE	PRIVILEGES
Trading Partner *Administrator*	Responsible for creating and managing all components of the application, including: • managing transactions • creating and managing trading partner relationships • setting up and maintaining routing rules • setting up and maintaining **carbon copy** rules • managing channels and associated rules • generating reports • administering the Trading Partner Profile, Users, and Notifications
Trading Partner *Basic User*	Responsible for creating and managing all components of: • managing transactions • generating reports • administering notifications
Trading Partner *Messaging User*	This user is able to view all screens and tabs within the application, but cannot perform any functionality, nor make changes to any configuration. **This is a read-only role.**

SWITCHING PROFILES

1. Click the arrow on the **Profile** drop-down menu.

   Where is the Profile menu?

   Located in the upper right corner of the toolbar.
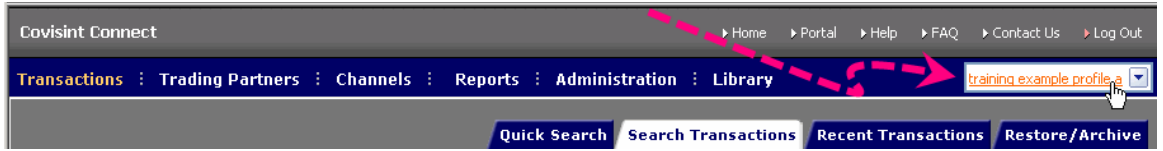
2. From the Switch Profile menu list, *click on the profile* to which you wish to switch. The screen refreshes to the newly selected profile.
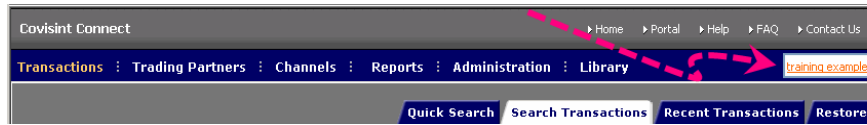

   ![i] Tasks are performed per **Trading Partner** Profile, and you may belong to more than one profile. Tasks only affect the current profile displayed. Verify that the profile displayed in the upper right corner of the screen is that in which you wish to perform administration. If it is not, switch profiles to the targeted profile.

   RESULT:

   You have successfully switched profiles.

TRANSACTIONS

An Overview of Transactions

Covisint Connect Administrators are able to manage transactions received and sent, identify and resolve *transaction* errors, and request data restoration.

In this section, you will find help with the following tasks:
- searching for a transaction
- requesting archived data
- managing recent transactions
- viewing the message details

> Recall that transactions are sent/received on a per-profile basis. Refer to Switching Profiles for further information.

Searching for Transactions

All users are able to search for transactions that are stored in the database via various criteria. Complete the following steps to search for a transaction.

> **i** If you wish to search for restored transactions, proceed to the section of this module entitled Searching Restored Transactions.

1. From the Transactions menu, click **Recent Transactions** tab. The Search for Transactions screen is displayed.

2. Set **search criteria** as desired.

Defining the search criteria	
COLUMN :	**DESCRIPTION:**
Search For	Enables the selection all records on a given page
Errors/Notifications	Sort records by *transaction* type listed
Message **ID / Control No:**	Key in the **control number** of the transaction for which you are searching
Delivery Receipt / Originator Message ID	Key in the message ID of the originator, if known.

Date Range (from)	Click [image] and select the beginning date in which you wish to filter transactions.
Date Range (to)	Click [image]) and select the ending date in which you wish to filter transactions.
Time Range (from)	Select the beginning time period in which you wish to filter transactions.
Time Range (to)	Select the ending time period in which you wish to filter transactions.
Document Types	Click and add the type of documents you wish include in this search criteria.
Trading Partners	Click and add the trading partners you wish include in this search criteria.
My identifiers	Click and add your identifiers that you wish include in this search criteria.

3. Click **Search**. The Search Results screen is displayed.

RESULT:

You have successfully searched for transactions.

Viewing a Transaction

From the Transactions menu, locate the *transaction* you wish to view by searching, or via the Recent Transactions tab. Once the transaction is identified, the Summary Information screen is displayed by clicking on the *Message* ID number.

This screen displays transaction summary data and status, processing history, exception details, *notification* details, *carbon copy* history, and documents contained within the message .

From this point, you may also:

If you wish to...	Then...
View *Payload* information	a. Click **View Message Data**. The Payload details are displayed. b. Search and select the line item detail of the payload you wish to view.
Redeliver the message to the recipient	Click **Redeliver Message**. (Redeliver takes the transaction in the form that it was saved for the receiver, and delivers it again to the receiver).
View Previous Delivery attempts	Click **View Previous Delivery Attempts**.

RESULT:

You have successfully viewed a transaction.

Managing Transactions

From this screen, Administrators can also view additional details of a specific message. Complete the steps below to view and manage:

- **transaction** summary
- message attributes
- process history
- applicable **carbon copy** rules

  • failure details if applicable

- documents contained in messages

1. From the Transactions menu, click **Recent Transactions.**

2. Click on the **Message ID number** for which you wish to view additional details. The Transaction Summary Information Screen is displayed.

3. Perform one or more of the following:

If you wish to...	Then...
View *Payload* information	a. Click **View Message Data**. The Payload details are displayed. b. Search and select the line item detail of the payload you wish to view.
If, after viewing payload information, you wish to save sender data to your hard drive	c. Click **Download Sender Data**. d. Select the location on your hard drive you wish to save the sender data. e. Click **Save**. f. Click **Close**.
If, after viewing payload information, you wish to save receiver data to your hard drive	g. Click **Download Receiver Data**. h. Select the location on your hard drive you wish to save the receiver data. i. Click **Save**. j. Click **Close**.
Redeliver the message to the recipient	Click **Redeliver Message**. (Redeliver takes the transaction in the form that it was saved for the receiver, and delivers it again to the receiver).
View *redelivery* processing (if applicable)	Click **View Redelivery Processing.**

RESULT:
You have successfully managed received transactions.

Redelivering a Transaction

A *transaction* that is "redelivered" is re-sent to the *trading partner* in the form and format in which it was originally delivered. The transaction is NOT reprocessed through Covisint Connect again. If you need a *document* reprocessed (the transaction is taken in the form that it was sent from the sender, and goes through all the processes in Covisint Connect), call the Covisint help desk.

1. Click **Transactions.**
2. Locate the transaction you wish to redeliver by searching, or viewing the Recent Transactions tab.
3. Enable the checkbox next to the transaction you wish to redeliver.
4. Scroll to the bottom of the screen, and click **Redeliver**.

> **RESULT:**
> You have successfully redelivered a transaction.

Requesting Archived Data

Administrators are able to request a restoration of archived data from Covisint. As a general setting*, Connect application stores up to 60 days of data; days 1 - 15 are available immediately online via this application, while data from days 16 - 60 are available offline by requesting a restore of archived data.   This process is completed by submitting to Covisint a request for a block of messages within your specified date range to be restored from the off-line storage (archive). You will receive a *notification* when the messages have been restored. Complete the following steps to issue this request to Covisint.

1. From the Transactions menu, click **Restore/Archive**.
2. Click **Request Restore from Archive**.
3. In the open text field, key in the reason for your request.
4. Click ▦ (calendar icon) in the FROM section and select the starting date range of the archive.
5. Click ▦ (calendar icon) in the TO section and select the ending date range of the archive.
6. Click **Submit Request**.   The confirmation screen is displayed.

> Once archives are restored, the archived *files* are located under the Restore/Archive tab. Therefore, you must search archived transactions via this Restore/Archive tab, the steps for managing archived transactions are the same as all other *transaction* types. The only difference in viewing and searching of archived transactions is that the archived files are located under the Restore/Archive tab, rather than the other Transactions tabs of Sent, Received, or Error.

RESULT:

You have successfully requested a restore from the archives.

(*Please refer to your contract for details regarding associated terms and conditions, rates, and length of time required to process your request).

Searching for Restored Transactions

Once archives are restored, the archived *files* are located under the Restore/Archive tab. Therefore, you must search archived transactions via this Restore/Archive tab. The steps for managing archived transactions are the same as all other transaction types. The only difference in viewing and searching of archived transactions is that the archived files are located under the Restore/Archive tab, rather than the other Transaction tabs.

1. From the Transactions menu, click **Restore/Archive.**   The Restored for Transactions screen is displayed.
2. Click **Search Restored Transactions**. The Search Restored Transactions screen is displayed.

3. Set **search criteria** as desired.

Defining the search criteria

COLUMN :	DESCRIPTION:
Search For	Enables the selection all records on a given page
Errors/Notifications	Sort records by *transaction* type listed
Control No:	Key in the **control number** of the transaction for which you are searching
Date Range (from)	Click ▦ and select the beginning date in which you wish to filter transactions.
Date Range (to)	Click ▦ and select the ending date in which you wish to filter transactions.
Time Range (from)	Select the beginning time period in which you wish to filter transactions.
Time Range (to)	Select the ending time period in which you wish to filter transactions.
Document Types	Click and add the type of documents you wish include in this search criteria.
Trading Partners	Click and add the trading partners you wish include in this search criteria.
My identifiers	Click and add your identifiers that you wish include in this search criteria.

4. Click **Search**. All of the archived transactions that match your search criteria are displayed.

RESULT:

You have successfully searched for restored transactions.

TRADING PARTNER RELATIONSHIPS

An Overview of Trading Partner Relationships

Covisint Connect Administrators are required to create **trading partner** relationships. This process requires a one-time set up for new trading partner relationships. Once established, the **Trading Partner** is responsible for the management of the relationship, including activating and deactivating relationships, maintaining customer information such as contact persons, billing information, and implementing delivery rules.

In this section, you will find help for the detailed processes and procedures for creating and managing trading partner relationships, including the following tasks:

- Request a trading partner relationship
- Manage the request queue
- Request and manage mapping
- Create and manage carbon copy rules
- Edit existing trading partner relationships

> Recall that **Trading Partner** relationships are created on a per-profile basis. Refer to Switching Profiles for further information.

Elements of the Trading Partner Screen

Covisint Connect Administrators are required to create trading partner relationships. This process requires a one-time set up for new trading partner relationships. Once established, the *Trading Partner* is responsible for the management of the relationship, including activating and deactivating relationships, maintaining customer information such as contact persons, billing information, and implementing delivery rules.

TOOLBAR MENU / Trading Partners Screen

Tab	Description
	Lists all trading partners that have current relationships with the administrator's trading partner profile.
Current Relationships	Click the **View relationship** link under the options column to view additional trading partner information, between "me" and this trading partner, such as: • list of maps in use • routing rules • carbon copy rules • *custom rules*
Request a Relationship	Search for trading partners by name or sender/receiver code . Create and submit a relationship request with a trading partner.

Tab	Description
Request Queue	Review pending relationship requests: REQUESTS SUBMITTED - Identifies requests that you have submitted to your trading partners. The status of that request displays "Awaiting Approval" until such time as your trading partner issues a decision on your request for a Trading Partner Relationship. REQUESTS RECEIVED - Trading partner that receives the request is able to review each relationship request. For each request, view the trading partner name, address, business reason for request, date requested, and payment terms. Approve or reject relationship requests.
Mapping	View all map rules for a profile. Sort rule/map list, view Sender or Receiver mapping details. Submit a request to Covisint for a new map, or request removal of an existing map.
Carbon Copies	View all carbon copy rules for my profile. Select carbon copy rule and view details. Create a new carbon copy rule and activate the rule into production.
Custom Rules	View all custom rules for my profile. Select custom rule and view details. Submit a request to Covisint for a new custom rule.

Maintaining Existing Trading Partner Relationships

Administrators are able to manage current relationships, including the ability to:
- View relationships
- View Trading Partner general information
- View **Trading Partner** additional/custom information
- Add Sender/Receiver codes to the Trading Partner Relationships
- Suspend Code Pairs
- Activate **Code Pairs**
- Delete Code Pairs

> Note to users that belong to more than one profile: Tasks are performed per profile. Therefore, any tasks performed effect only the current profile displayed.

The Current Relationship tab displays all existing relationships. Modify a relationship via the "View relationship" link in the Options column. Complete the following steps to modify an existing relationship.

1. From the Trading Partners menu, click **Current Relationships.**
2. Click **View relationship** link in the Options column of the particular trading partner relationship you wish to modify.
3. Perform one or more of the following options:

If you wish to…	Then…
Add More Code Pairs	a. Click **Add More Code Pairs** b. From the drop-down menus, select the Sender Code and *Receiver Code* for this relationship. c. Scroll to the bottom of the screen and click **Save Relationship.** Trading partners can add more code pairs without initiating another request. The approval is at the relationships level. Code Pairs are automatically set to the same status as a relationship. If you suspend or delete a relationship, so too are the code pairs.
Save Chanes Made to the Relationship	Click **Save Relationship**. The screen is refreshed and any changes to the relationship are saved.
Suspend a Code Pair	a. Click **Suspend** link in the Suspend column of the code pair you wish to temporarily disable. b. Optionally, key in the reason for the suspension in the open text field. c. Click **Suspend Code Pair**. The confirmation screen is displayed.
Reactivate a suspended code pair	a. Click **Activate** link in the Suspend column of the code pair you wish to reactivate. b. Optionally, key in the reason for reactivation in the open text field. c. Click **Activate Relationship**. The confirmation screen is displayed.
Delete a code pair	a. Click **Delete** link in the Delete column of the code pair you wish to permanently remove from the relationship. b. Key in the reason for deletion in the open text field. c. Click **Delete Code Pair**. The confirmation screen is displayed.
Identify the Relationship Type	From the drop box, select the type of relationship: • Both Supplier and Customer • Customer • Service Provider

If you wish to…	Then…
	- Carrier - Supplier
Set Up *Notification /* **Approval requirements**	You have the option of being notified when a change is made to your trading partner relationship. You may also require approval to changes made to your relationship. By default, these are not required. However, you may require notification and / or approval by selecting "YES" from the drop box. When Approval is required, a code pair status is listed as one of the following: - suspension requested for this code pair - code pair requested - deletion requested for this code pair *Code pair requests cannot exist in both directions simultaneously. The request must be approved before that approver can make an additional request.
Delete the Relationship	Click **Delete Relationship**. Code Pairs are automatically set to the same status as a relationship. If you suspend or delete a relationship, so too are the code pairs.
Suspend the Relationship	Click **Suspend Relationship**. Code Pairs are automatically set to the same status as a relationship. If you suspend or delete a relationship, so too are the code pairs.

RESULT:
You have successfully maintained existing trading partner relationships.

Requesting a New Trading Partner Relationship

1. From the Trading Partners menu, click **Request a Relationship**.
2. Key in the name (or partial name) of the trading partner with whom you wish to establish a relationship, then click **Search**. A list of all Trading Partners registered in Connect is displayed.
3. Perform one or more of the following:

If …	Then...
you wish to establish a relationship with one of the Trading Partners listed…	a. Enable the radio button next to the Trading Partner Profile Name you wish to invite. b. Click **Continue with selected**… The Trading Partner Summary/Set up screen is displayed. c. Proceed to step 4.
the Trading Partner that you wanted to invite is not listed…	a. Click **Search Again**. b. Click the **Covisint Connect Specialist** link located in the Instructions section of the Find a Trading Partner screen. The screen prompts you to provide details of the partner for whom you are searching. c. Key in the required fields, as identified with the red bar d. Click the calendar icon, and select the date by which you wish the relationship request is completed. e. Click **Submit**. An email is sent to a Covisint Connect Specialist to request that Trading Partner to register with Covisint Connect. f. Do not proceed to step 4. Your next step is to wait to be contacted by a Covisint Connect Specialist.

4. Complete the following profile requirements:

From this section…	Perform these steps...
Sending *Code Pairs*	a. From the *Sender Code* for (your company) column, select the sender code from the drop box. b. From the *Receiver Code* for (the company you are inviting) column, select the receiver code that correlates with the sender code in that row. c. Continue matching Sender and Receiver codes as necessary. d. Proceed to step 5.

From this section...	Perform these steps...
	Note: YOU MAY OPEN MORE ROWS TO ADD ADDITIONAL SENDER AND RECEIVER CODES BY CLICKING **ADD MORE CODE PAIRS**.
Receiving *Code Pairs*	a. From the Receiving Code for (your company) column, select your company's receiving code from the drop box. b. From the Sender Code for (the company you are inviting) column, select the Sender code that correlates with the receiver code in that row. c. Continue matching Receiver and Sender codes as necessary. d. Proceed to step 5.
Relationship Type	From the drop box, select the type of relationship: • Both Supplier and Customer • Customer • Service Provider • Carrier • Supplier
***Notification /* Approval**	You have the option of being notified when a change is made to your trading partner relationship. You may also require approval to changes made to your relationship.
Business Purpose of Relationship	Key in the business purpose of this trading partner relationship.
Payment Relationship	a. Enable the radio button next to the payment percentage you wish to establish for this relationship. You may choose from: • 100% pay = You will pay for transactions of your company as well as the partner whom you are inviting. • 50% pay = You will pay for only your company's transactions. • 0% pay = Your trading partner will pay for transactions of your company in addition to their own transactions. a. Proceed to step 5.

5. Click **Continue to next step...** The Request Submitted confirmation screen is displayed.

RESULT:

You have successfully invited a Trading Partner to establish a relationship within the Connect application.

Managing the Request Queue

From the **Request Queue** tab of the Trading Partners screen, you are able to view all pending relationship requests.

The REQUESTS SUBMITTED section identifies requests that you have submitted to your trading partners. The status of each request is displayed as Awaiting Approval, until such time as your trading partner issues a decision on your request for a Trading Partner Relationship.

The REQUESTS RECEIVED section identifies requests that you have received from others to establish a trading partner relationship. Once your decision has been rendered, your trading partner receives an email stating the decision of the request. The following section identifies the approval process for managing received requests.

Complete the following steps to issue a decision on relationship requests.

1. From the Trading Partners menu, click **Request Queue.**
2. Perform one or more of the following:

If you wish to...	Then...
Approve a single relationship request	a. Click **Approve** in the approve column of that row. The Decision screen is displayed. b. Modify fields if required. c. Click **Approve Request.** The screen refreshes, and the confirmation of the decision is displayed. The relationship has been approved, and the trading partner is informed of your decision. You may begin using Covisint Connect with this trading partner.
Reject a single relationship request	a. Click **Reject** in the reject column of that row. The Decision screen displays. b. Key in the required reason for rejection in the open text box. c. Click **Reject request**. The screen refreshes, and the confirmation of the decision displays. The relationship has been rejected, and the trading partner is informed of your decision.
Approve multiple relationship requests	a. Enable the checkbox next to the name of each Trading Partner that has requested a relationship that you wish to accept. b. Click **Bulk Approve Checked**. The relationships have been approved, and the trading partners are informed of your decision. You may begin using Covisint Connect with each trading partner.

RESULT:

You have successfully issued a decision on trading partner relationship requests.

Carbon Copy Defined

A **carbon copy** is an exact duplicate of a transaction that is forwarded to a trading partner other than the originally intended recipient. This is determined by a set of **carbon copy rules** configured by the trading partner within the connect application. The Carbon Copy receiver must be a registered Covisint Connect trading partner. The Covisint Connect system replaces the original sender and receiver codes in the transaction with the new sender and receiver codes, as defined in the carbon copy rules.

Administrators are able to view all rules of carbon copy per profile, as well as create and activate new rules into production.

Creating Receiver Carbon Copy Rules

1. From the Trading Partners menu, click **Carbon Copies.**

2. Click **Add Rec Rule**. The Create New Receiver **Carbon Copy** Rule screen is displayed.

3. Create a Rule Name in the open text box.

4. Key in applicable Sender Codes in the open text field, separated by a comma. Alternately, click **Add** to view a list of Sender Codes.

5. Key in applicable Receiver Codes in the open text field, separated by a comma. Alternately, click **Add** to view a list of Receiver Codes.

6. Key in applicable Formats in the open text field, separated by a comma. Alternately, click **Add** to view a list of Formats.

7. Key in applicable Types in the open text field, separated by a comma. Alternately, click **Add** to view a list of Types.

8. Key in applicable Versions in the open text field, separated by a comma. Alternately, click **Add** to view a list of Versions.

9. Optionally, add notes if desired.

10. Key in applicable Trading Partner Codes in the open text field, separated by a comma. Alternately, click **Add** to view a list of Trading Partner Codes.

11. Click **Save**.

You have successfully created a new receiver carbon copy rule for a *trading partner* relationship.

Creating Sender Carbon Copy Rules

1. From the Trading Partners menu, click **Carbon Copies.**

2. Click **View Sender Rules**.

3. Click **Add Sender Rule**. The Create New Sender *Carbon Copy* Rule screen is displayed.

4. Create a *Rule Name* in the open text box.

5. Key in applicable Sender Codes in the open text field, separated by a comma. Alternately, click **Add** to view a list of Sender Codes.

6. Key in applicable Receiver Codes in the open text field, separated by a comma. Alternately, click **Add** to view a list of Receiver Codes.

7. Key in applicable Formats in the open text field, separated by a comma. Alternately, click **Add** to view a list of Formats.

8. Key in applicable Types in the open text field, separated by a comma. Alternately, click **Add** to view a list of Types.

9. Key in applicable Versions in the open text field, separated by a comma. Alternately, click **Add** to view a list of Versions.

10. Optionally, add notes if desired.

11. Key in applicable Trading Partner Codes in the open text field, separated by a comma. Alternately, click **Add** to view a list of Trading Partner Codes.

12. Click **Save**.

You have successfully created a new sender carbon copy rule for a *trading partner* relationship.

Managing Receiver Carbon Copy Rules

1. From the Trading Partners menu, click **Carbon Copies.**
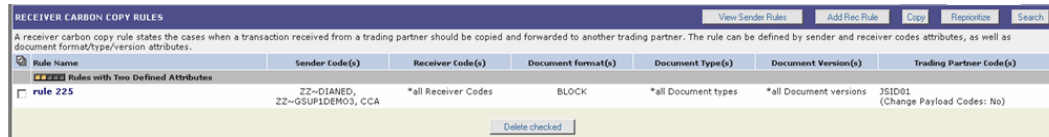
2. Navigate to the rule you wish to modify.
3. Perform one of the following:

If you wish to…	Then…
delete exiting rules	a. Enable the checkbox of each rule you wish to delete. b. Click **Delete checked**. c. Click **OK** from the confirmation dialog box. The screen refreshes, and the rules are removed.
modify an existing rule	a. Click on the Rule Name. b. Click **Edit this rule** in the Options column of the rule. c. Modify as desired (Refer to the section entitled Created Carbon Copy Rules for further details). d. Click **Continue**. The screen refreshes, and the rule is modified.
reprioritize an existing rule	Proceed to the section entitled Reprioritizing Rules for details work steps.

RESULT:
You have successfully edited a receiver carbon copy rule for a *trading partner* relationship.

Managing Sender Carbon Copy Rules

1. From the Trading Partners menu, click **Carbon Copies.**

RECEIVER CARBON COPY RULES			View Sender Rules	Add Rec Rule	Copy	Reprioritize	Search

A receiver carbon copy rule states the cases when a transaction received from a trading partner should be copied and forwarded to another trading partner. The rule can be defined by sender and receiver codes attributes, as well as document format/type/version attributes.

| Rule Name	Sender Code(s)	Receiver Code(s)	Document format(s)	Document Type(s)	Document Version(s)	Trading Partner Code(s)
▮▮▮▮▮ Rules with Two Defined Attributes						
☐ rule 225	ZZ~DIANED, ZZ~GSUP1DEMO3, CCA	*all Receiver Codes	BLOCK	*all Document types	*all Document versions	JSID01 (Change Payload Codes: No)

Delete checked

2. Click **View Sender Rules**.
3. Perform one or more of the following:

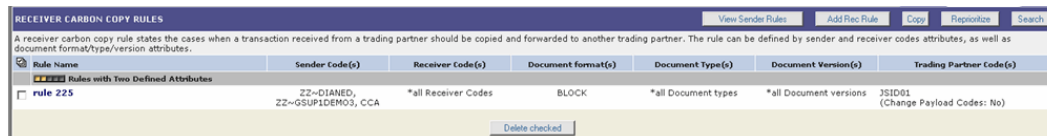| If you wish to...	Then...
delete exiting rules	a. Enable the checkbox of each rule you wish to delete. b. Click **Delete checked**. c. Click **OK** from the confirmation dialog box. The screen refreshes, and the rules are removed.
modify an existing rule	a. Click **Edit rule** in the Options column of the rule you wish to modify. b. Modify as desired, any of the three references to the rule, including: • Trading Partners from whom you receive. • *Document* Formats • Trading Partners to whom the **carbon copies** are sent. a. Click **Continue**. The screen refreshes, and the rule is modified.
reprioritize an existing rule	Proceed to the section entitled [Reprioritizing Rules](#) for details work steps.

RESULT:
You have successfully edited a sender carbon copy rule for a trading partner relationship.

Reprioritizing Carbon Copy Rules

Trading Partner Administrators can prioritize the order in which carbon copy rules are applied. Complete the following steps from the ***Carbon Copies*** tab of the Trading Partner screen to reprioritize a receiver or sender rule.

1. From the Trading Partners menu, click **Carbon Copies.**
2. Click **Reprioritize**.
3. Select the name of the rule you wish to reorder from the selection menu.
4. Perform one or more of the following:

If you wish to…	Then…
assign the rule to a higher *priority*	a. Click **Move up**. The rule is moved up one level in the order in which it will be implemented b. Continue clicking **Move up** until the rule is listed in the order in which you wish it to be applied. c. Proceed to step 5.
assign the rule to a lower priority	a. Click **Move down**. The rule is moved down one level in the order in which it will be implemented b. Continue clicking **Move down** until the rule is listed in the order in which you wish it to be applied. c. Proceed to step 5.

5. Click **Save Priority Settings.**

RESULT:
You have successfully reprioritized carbon copy rules.

Submitting Requests for Custom Rules

When new rules are required, or changes to existing rules are desired for *Custom Processing* in Connect, Administrators must submit the rule request to the Covisint Connect team. Complete the following steps from the *Trading Partners* menu to submit a rule request for an existing relationship.

1. From the Trading Partners menu, click **Custom Rules** tab.
2. Click **Custom** tab.
3. Perform one of the following:

If you wish to…	Then…
request a custom receiver rule	a. click **Request rule**. b. proceed to step 4.
request a custom sender rule	a. click **View Sender Rules**. b. click **Request Rule**. c. proceed to step 4.

4. Key in the *description of your custom rules request* in the open text field.
5. Click **Submit Custom Processing Request**. The screen refreshes, and your request is submitted.

RESULT:
You have successfully submitted a request to create or edit a custom processing rule. You will be contacted by the Covisint Connect team.

Creating Receiver Transformation Rules

Transformation (also known as *mapping*) is the Covisint Connect service that provides *translation* services from one *document* format/version to another. Transformations are created by Covisint, and there may be charges associated with transformation. You may wish to review your contract before submitting a request.

1. From the Trading Partners menu, click **Transformations.**
2. Click **Request Rule**.
3. In the open text field, to the best of your ability, key in a description of your request.
4. Click **Submit Mapping Request.** A Covisint Connect Specialist will contact you to continue your request.

RESULT:

You have successfully created a request for a new receiver transformation rule.

Creating Sender Transformation Rules

Transformation (also known as *mapping*) is the Covisint Connect service that provides *translation* services from one *document* format/version to another. Transformations are created by Covisint, and there may be charges associated with transformation. You may wish to review your contract before submitting a request.

1. From the Trading Partners menu, click **Transformations.**
2. Click **View Sender Rules**
3. Click **Request Rule**.
4. In the open text field, to the best of your ability, key in a description of your request.
5. Click **Submit Mapping Request.** A Covisint Connect Specialist will contact you to continue your request.

RESULT:

You have successfully created a request for a new sender transformation rule.

Managing Existing Transformation Rules

Transformations can only be modified by a Covisint Connect specialist.   To make a change to a rule, submit your request to the Covisint Connect team by performing the steps below.

If you wish to...	Then...
modify or delete a receiver *transformation*	Key in your request into the request form by following the steps for Creating a Receiver Transformation Rule.
modify or delete a sender rule	Key in your request into the request form by following the steps for Creating a Sender Transformation Rule.

PROFILE ADMINISTRATION

Profile Administration Overview

Covisint Connect Administrators are responsible for maintaining their profiles, creating new profiles, maintaining profile users and contacts, and maintaining sender/receiver codes.

In this section, you will find help with the following tasks:

- Maintain your Trading Partner Profile
- Add or Edit Sender/Receiver Codes
- Add or Maintain bill-to addresses per profile
- Manage notification subscriptions
- Maintain contact lists
- Add, Edit, or Remove Users or Contacts
- Approve Users to your Trading Partner Profile

> Tasks are performed per profile. Therefore, any tasks performed affect only the current profile displayed.. Refer to Switching Profiles for further information.

Elements of the Profile Administration Screen

Profile Administration tasks are located by clicking the Administration menu,

Each of these functions are defined as:

| TAB	TASKS TO PERFORM
Profile	Edit your profile name and address, create new sender/ receiver codes for your profile, set up one ***payment account*** per profile, and create emergency contacts.
Create Profile	Create a new profile
Notifications	Observe all notifications that have been sent and add to or edit the error contact lists. Contact lists can be set up to send email, text page, or cell phone ***message***. Associate contacts with events: List a contact name under alert types such as "transmission errors", "processing errors" or "delivery errors". Mark a ***notification*** as "handled": Shows the event as handled so other users are not working on an issue that is being handled or resolved. Assign error notification delivery frequency: The trading partner ***administrator*** can configure the frequency of delivery for the notification messages. This frequency is defined in minutes. So, if the frequency for "delivery errors" is set to 15 minutes, this means that after the first error notification is sent, another error notification for a duplicate error will not be sent for until 15 minutes have elapsed. This prevents a Trading Partner user from receiving multiple error notification messages for the same error condition within a short period of time.
User Administration	View existing users of a profile, manage user access requests, and add or remove users.

RESULT:

You have successfully reviewed the profile administration screen.

Editing a Trading Partner Profile

From the Profile tab of the Administration screen, complete the following steps to edit a ***trading partner*** profile.

1. Verify that the **Profile** displayed in the top left corner of the screen is that which you wish to modify. (If it is not, select the appropriate profile from the drop down menu)

> **Where is the Profile menu?**
>
> Located in the upper right corner of the toolbar.
>
>
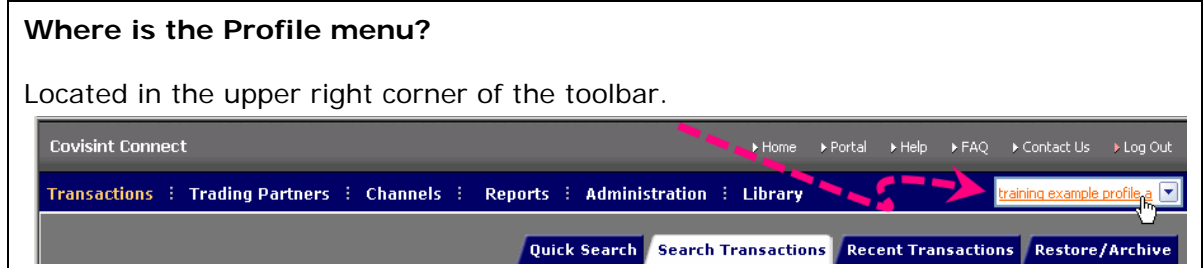
2. From the Administration menu, click **Profile** tab.
3. Click **Edit Profile**.
4. Edit your profile information as you wish.
5. Click **Save Profile**. The screen refreshes, and the main Profile tab is displayed with a confirmation of the updated information.

RESULT:

You have successfully editing an existing trading partner profile.

Creating a New Trading Partner Profile

From the Profile tab of the Administration screen, complete the following steps to create a trading partner profile.

1. From the Administration menu, click **Create Profile** tab. The Select a Profile screen is displayed.

2. Complete the following steps per section:

SECTION	STEPS TO COMPLETE
In the TRADING PARTNER PROFILE NAME section:	Key in the name you wish to give your new profile.
In the TRADING PARTNER PROFILE MAIN ADDRESS section:	a Key in all required fields to identify the street address of your new profile. b Key in any optional fields, as desired.
In the MY SENDER/RECEIVER CODES section:	a From the drop-down menu, select the code *qualifier* (if desired). b Key in the required Code for the qualifier selected.
In the CONTACTS section:	a Click **Add New Contact…** b Key in the name title, and phone number of the contact for this profile. c Click **Save**.

4. Click **Continue…** The SELECT A BILLING ACCOUNT screen is displayed.
5. Perform one of the following:

If you wish to…	Then:
send invoice to an existing *payment*	a Enable the radio button of the payment account to which you wish to be invoiced for this profile

If you wish to...	Then:
account	b Click **Select and Continue**...
create a new payment account	a Click **Add a new billing account** b Key in all fields as required/desired. c Click **Save Payment Account.**

RESULT:
You have successfully created a new trading partner profile.

Maintaining Contact Information

Trading Partner Administrators must designate people to be contacted by the Covisint application administration team in the event of an emergency issue. Each Trading Partner profile must have or more contact names listed. These contact names will be used if there is an outage, a messaging delivery issue, or if the Covisint *hub* Disaster Recovery (DR) plan has been invoked.

1. From the Administration menu, click **Profile** tab.
2. Click **Add New Contact.**
3. Key in all required information, and any additional information as desired.
4. Click **Save**. The screen refreshes, and the main Profile screen is displayed with a confirmation of the updated contact information.
5. Perform one or more of the following:

If you wish to...	Then:
edit existing contact information	a. From the Edit column of the selected contact person, click **Edit Contact**. b. Edit the contact's information as desired, then click Save. The confirmation box is displayed. c. Click **OK** to confirm edits to this contact. The screen refreshes, and displays the updated contact information.
delete a contact	a. From the Delete column of the selected contact name, click **Delete**. The confirmation box is displayed. b. Click **OK** to confirm the deletion of this contact. The screen refreshes, and the code is removed from the system.

RESULT:
You have successfully maintained contact information for a trading partner profile.

Modifying Payment Account Information

Trading Partner administrators must assign one *payment account* per trading partner profile. This is generally configured upon profile set up. At times, it may be necessary to create a new payment account, or change the payment account to another, existing account.

1. From the Administration menu, click **Profile** tab.
2. Click **Change Billing Account.**
3. Perform one of the following

If you wish to…	Then:
create a new payment account	a. Scroll to the bottom of the screen and click **Add a new billing account**. b. Key in all required fields, and any optional fields as desired. c. Click **Save Payment Account**.
change the payment account to another, existing account	a. Enable the radio button of the existing payment account that you wish to receive invoices for this profile. b. Click **Select and Continue…**

RESULT:
You have successfully modified a payment account for a trading partner profile.

Activating a Sender/Receiver Code

1. From the Administration menu, click **Profile** tab.
2. From the **Activate/Inactivate column** of the selected code, click **Activate**. The confirmation box is displayed.

Where is the Activate/Inactivate column?

3. Click **OK** to confirm rendering this code as inactive. The screen refreshes, and displays the code status as inactive.

RESULT:

You have successfully activated a sender/receiver code for a ***trading partner*** profile.

Inactivating a Sender/Receiver Code

1. From the Administration menu, click **Profile** tab.
2. From the **Activate/Inactivate column** of the selected code, click **Inactivate**. The confirmation box is displayed.

3. Click **OK** to confirm rendering this code as inactive. The screen refreshes, and displays the code status as inactive.

> **RESULT:**
>
> You have successfully inactivated a sender/receiver code for a ***trading partner*** profile.

Deleting a Sender/Receiver Code

1. From the Administration menu, click **Profile** tab.
2. Verify that the code is Inactive. You can only delete a sender/receiver code that has an <u>inactive status.</u>
3. From the **Delete column** of the selected code, click **Delete**. The confirmation box is displayed.

4. Click **OK** to confirm the deletion of this code. The screen refreshes, and the code is removed from the profile.

RESULT:

You have successfully deleted a sender/*receiver code* for a *trading partner* profile.

Adding Sender/Receiver Codes

Complete the following steps to add sender/receiver codes within a ***trading partner*** profile.

1. From the Administration menu, click **Profile** tab.
2. Click **Add More Codes.**
3. From the drop-down menu, select the code ***qualifier*** (if desired).
4. Key in the required code.
5. Key in the code description.
6. Click **Save Code**. The screen refreshes, and the main Profile tab is displayed with a confirmation of the updated information.

> **RESULT:**
>
> You have successfully added sender/receiver codes for a trading partner profile.

Adding Notification Subscriptions

Administrators are able to create and manage **notification** subscriptions. Subscriptions enable recipients to receive notification when selected events occur, based upon subscription set up. Complete the following steps to subscribe to a notification type.

If you wish to manage existing subscription notifications such as deleting or editing subscriptions, or adding or deleting recipients, refer to the section entitled Managing Notification Subscriptions.

1. From the Administration menu, click **Notifications** tab.
2. Click **View/Edit Notification Changes.**
3. Click **Add a new subscription**...
4. Enable the check box of each event that should be part of this notification subscription.
5. Optionally, from the drop down menu, select the timing in which this notification should occur.
6. Enter the name and email address of each recipient you wish to be notified via this subscription.
7. Click **Save subscription**. The screen refreshes, and the updated Current Subscriptions screen is displayed.

RESULT:
You have successfully added a notification subscription.

Managing Notification Subscriptions

Administrators are able to manage ***notification*** subscriptions. Subscriptions enable recipients to receive notification when selected events occur, based upon subscription set up. Complete the following steps to manage notification subscriptions.

If you wish to add a new notification to the list, refer to the section entitled Adding Notification Subscriptions.

1. From the Administration menu, click **Notifications** tab.
2. Click **View/Edit Notification Changes.**
3. Perform one or more of the following:

If you wish to…	Then:
delete a subscription	a. Enable the checkbox of the subscription you wish to delete. b. Click **Unsubscribe checked**. c. Click **OK** from the confirmation dialog box.
edit a subscription	a. Click **Edit** in the Edit Event column of the subscription you wish to modify. b. Edit as desired. c. Click **Save subscription.**
delete a recipient	a. Click 🗑 next to the recipient's name. b. Click **OK** from the confirmation dialog box.
add a recipient to the Subscription	a. Click **Add Recipients.** b. Key in the recipient's name and email address. c. Click **Save contacts**.
add a new subscription	refer to the section entitled Adding Notification Subscriptions.

RESULT:
You have successfully managed a notification subscription.

USER ADMINISTRATION

Adding a User to the Profile

Users may belong to more than one profile. Administration of a user is performed on a per-profile basis.

1. From the Administration menu, click **User Administration** tab.

2. Click **Add Users**. The Add User screen is displayed.

3. Key in the User's Covisint User ID,Name, or email address, then click **Find User.**

4. Enable the radio button of the user you wish to add to this profile.

5. From the *Role selection* drop-down menu, select the role you wish to assign to this user.

6. Perform one of the following

If you wish to...	Then:
activate this user to this profile	a. From the selection drop down menu, select **Active**. b. Proceed to step 6.
issue a request to the Profile Administrator that this user be added to the profile	a. From the selection drop down menu, select **Requested**. b. In the Request reason open text field, key in the reason that you wish to have this user added to the profile. c. Proceed to step 6.

7. Click **Add**. The screen refreshes, and the main User Administration tab is displayed confirming the updated information.

> ⓘ Recall that Users listed have already met the following criteria:
>
> o received a Covisint User ID and Password.
>
> o been approved by their Security Administrator for their organizations
>
> o are approved by their Security Administrator to access the Covisint Connect application.

RESULT:

You have successfully added a new user to a trading partner profile.

Deleting Users from a Profile

Trading Partner Administrators are able to delete users from the profiles that they manage.

1. From the Administration menu, click **User Administration** tab.
2. From the PROFILE USERS section of the screen, enable the checkbox of each user you wish to delete from the profile.
3. Click **Delete Checked.**
4. Click **OK** from the confirmation box to confirm this deletion. The screen refreshes, and the main User Administration tab is displayed confirming the deletion.

RESULT:

You have successfully deleted users from a profile

Managing User Requests to Join the Profile

As a Profile Administrator, you are able to approve or reject a user request to join your trading partner profile.

1. From the Administration menu, click **User Administration** tab.

2. Scroll to the Pending User Requests section of the screen.
3. Perform one or more of the following:

If you wish to...	Then:
approve a user's request to join the profile	a. Enable the checkbox of each person you wish to approve. b. Click **Approve**. The screen refreshes and each approved user is added to the profile.
reject a user's request to join the profile	c. Enable the checkbox of each person you wish to reject. d. Click **Reject**. The screen refreshes and the rejected user is removed from the pending queue.

> **RESULT:**
>
> You have successfully managed user requests to be added to a trading partner profile.

Modifying a User's Role

1. From the Administration menu, click **User Administration** tab.
2. Search and select the user for whom you wish to modify [roles](#).
3. From the search results, click on the *role currently assigned* to that user. The Edit User Role screen is displayed.
4. Enable the radio button of the role you wish to assign to this user.
5. Click **Update**. The screen refreshes and the new role will take affect the very next time this user logs into Connect. If the user is currently logged in, the role modification will not take place until that user logs out of Connect application, and then back into Connect.

RESULT:

You have successfully modified a user's role.

Requesting a User to Join the Profile

As an Administrator, you are able to request a user belonging to another profile in your organization to also join your trading partner profile. Complete the steps below to issue this request.

1. From the Administration screen, click **User Administration** tab.
2. Click **Add Users.**
3. Key in user search criteria, then click **Find User.**
4. Enable the radio button of the person to which you wish to issue the request.
5. Select the role you wish to request for this profile from the *Select Role* drop down menu.
6. Select request from the *Select Status* drop down menu.
7. Key in the reason for this request in the open text field.
8. Click **Add**. The request is submitted to the Profile Administrator.

RESULT:

You have successfully requested a user to join the profile.

An Overview of Channels

A *channel* defines the connection method used to transmit or receive documents. In this section, you will find help for the detailed processes and procedures for managing your existing channels.

Contact your Covisint Connect Specialist if you wish to create, modify or delete a channel.

Creating a Maintenance Window

A *maintenance window* is a time you define that your system handling a channel will be unavailable to send or receive messages.

Adding a maintenance window informs the Covisint Connect system of potential downtime of your system. *Transaction* traffic will NOT be stopped during a defined maintenance window. However, the notifications and alerts sent during the window will reflect the identified maintenance window information.

Complete the following steps from the Channel Detail screen to manage a maintenance window.

1. From the **Channels menu**, click **Connection Channels**.

Where is the Connection *Channel* tab?

Transactions : Trading Partners : Channels : Reports : Administration : Library				
	Connection Channels	Request Connection	Routing Overview	Add Routing Rule
MY CHANNELS				
Channel	Direction	Protocol	Status	Options
LR INBOUND FTP-PUSH	Both	FTP-MAILBOX	☑ Active	View Channel
LR OUTBOUND HTTP-MAILBOX	Both	FTP-MAILBOX	☑ Active	View Channel
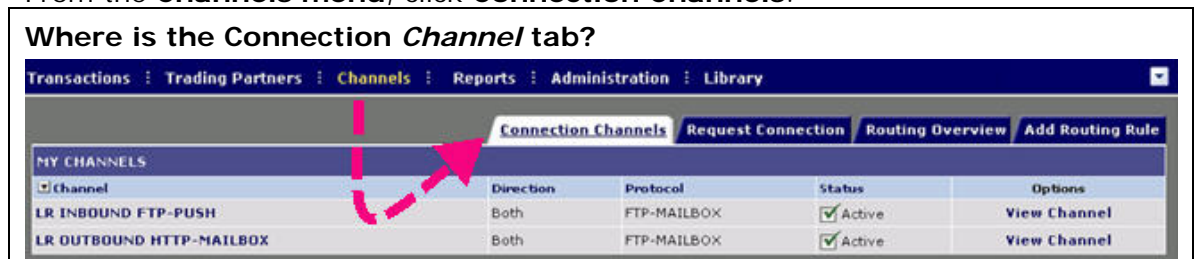
2. Click **View Channel** within the Options column of the channel for which you wish to add a maintenance window.
3. Click **Add Maintenance Window.**
4. Enter the required information (identified by an asterisk * and red font).
5. Click **Save**.

> **RESULT:**
>
> You have successfully added a maintenance window for this channel.

Modifying or Deleting a Maintenance Window

At times, it may be necessary to modify or delete an existing *maintenance window*. When this is required, complete the following steps from the Channel Detail screen.

> ⓘ A *maintenance window* informs the Covisint Connect system of potential downtime of your system. *Transaction* traffic will NOT be stopped during a defined maintenance window. However, the notifications and alerts sent during the window will reflect the identified maintenance window information.

1. From the **Channels menu**, click **Connection Channels**.

Where is the Connection Channel tab?

Transactions ⋮ Trading Partners ⋮ **Channels** ⋮ Reports ⋮ Administration ⋮ Library				
	Connection Channels	Request Connection	Routing Overview	Add Routing Rule
MY CHANNELS				
⊟ **Channel**	Direction	Protocol	Status	Options
LR INBOUND FTP-PUSH	Both	FTP-MAILBOX	☑ Active	**View Channel**
LR OUTBOUND HTTP-MAILBOX	Both	FTP-MAILBOX	☑ Active	**View Channel**

2. Click **View Channel** within the Options column of the channel for which you wish to modify/delete a maintenance window.

3. Perform one or more of the following:

If you wish to...	Then...
Edit an Existing Maintenance Window	a Click **Edit Window** in the Edit column of the window you wish to modify.
	b Edit as desired.
	c Click **Save**. The Channel Details screen is refreshed, and the edited maintenance window is displayed.
Delete an Existing Maintenance Window	a Click **Delete Window** in the Delete column of the window you wish to remove.
	b Click **OK** from the confirmation dialog box. The Channel Details screen is refreshed, and the selected maintenance window is removed.

RESULT:

You have successfully edited/deleted a maintenance window for this channel.

Temporarily Disabling a Channel

This option allows you to "Temporarily" disable an existing *channel*. This may be necessary if your business system communicates real-time with Covisint Connect and your business system experiences an unplanned outage.

Complete the following steps from the Connection Channels screen to temporarily disable a channel for a *Trading Partner* profile.

> ⓘ Customers may elect to set up a secondary, back-up channel to a primary channel. Routing will occur to this channel only if the primary channel is found inactive.

1. From the Channels menu, click **Connection Channels**.
2. Click **View Channel** from the options column of the channel that you wish to render Inactive.
3. Click **Temporarily disable channel**.
4. Click **OK**.

RESULT:
You have successfully temporarily disabled channel.

Reactivate a Temporarily Disabled Channel

1. From the Channels menu, click **Connection Channels**.
2. Click the **View *Channel*** link from the options column of the channel that is Inactive.
3. Click **Enable channel.**
4. Click **OK**.

RESULT:
You have successfully reactivated a disabled channel.

Creating New Routing Rules

Routing rules allow the Trading Partner Administrator to route documents through the appropriate Channel based on the specific attributes of a ***document***, its sender, and/or receiver.

An example of a routing rule would be: If the sender is Customer A and the receiver is Supplier B, and the document is a Material Release (862), then route this document to Channel "FTP-Mailbox-Name".

1. From the Channels menu, click **Add *Routing Rule*** tab.
2. In the open text field, key in the *Sender Codes* to which this rule applies, separated by a comma. Alternately, click **Add** to select Sender Codes from a list.
4. In the open text field, key in the *Receiver Codes* to which this rule applies, separated by a comma. Alternately, click **Add** to select Receiver Codes from a list.
5. In the open text field, key in the *Document Formats* to which this rule applies, separated by a comma. Alternately, click **Add** to Formats from a list.
6. In the open text field, key in the *Document Types* to which this rule applies, separated by a comma. Alternately, click **Add** to select Document Types from a list.
7. In the open text field, key in the *Document Versions* to which this rule applies, separated by a comma. Alternately, click **Add** to select Document Versions from a list.
8. From the drop-down menu, select the channel to which this rule applies.
9. Configure optional settings as necessary.
10. Click **Save**.

> **RESULT:**
> You have successfully created and activated a new routing rule for a channel.

Managing Routing Rules

1. From the Channels menu, click **Routing Overview** tab. The Current Routing Rules screen is displayed.

2. Perform one of the following:

If you wish to…	Then…
delete an existing rule	a. Enable the checkbox of each rule you wish to delete. b. Click **Delete checked**. c. Click **OK** from the confirmation dialog box. The screen refreshes, and the rules are removed.
modify an existing rule	a. Click on the name of the rule you wish to edit. b. Click **Edit this rule.** c. Edit the rule as desired a. Click **Save.**

RESULT:

You have successfully edited an existing routing rule for a *channel*.

Reprioritizing Routing Rules

Trading Partner Administrators can prioritize the order in which rules run in the system. Complete the following steps to reprioritize a rule.

1. From the Channels menu, click **Routing Overview** tab.
2. Click **Reprioritize.** The Routing Rules screen is displayed.

In this screen example, there are three categories of rules, one category of rules with zero defined attributes, one category with one defined attribute, and one category with two defined attributes . You are able edit the order in which rules are implemented for rules that contain the same number of defined attributes.
 Complete the following steps per attribute category to edit the order in which a rule is implemented.

3. Click on the rule for which you wish to edit the order.

4. Perform one of the following :

If you wish to...	Then...
assign the rule to a higher *priority*	a. Click **Move up**. The rule is moved up one level in the order in which it will be implemented b. Continue clicking **Move up** until the rule is listed in the order in which you wish it to be applied. c. Proceed to step 5.
assign the rule to a lower priority	a. Click **Move down**. The rule is moved down one level in the order in which it will be implemented. b. Continue clicking **Move down** until the rule is listed in the order in which you wish it to be applied. c. Proceed to step 5.

5. Click **Save Priority Settings.**

RESULT:
You have successfully reprioritized routing rules.

Adding a Channel Contact

Trading Partner Administrators must designate people to be contacted by the Covisint application administration team in the event of an emergency issue. Each **channel** must have one or more contact names listed. These contact names are used if there is an outage, a messaging delivery issue, or if the Covisint **hub** Disaster Recovery (DR) plan has been invoked. This is your organization's contact, the person who is responsible for this channel.

Complete the following steps from the Connection Channels screen to add a new contact person to a channel.

1. From the Channels menu, click the **Connection Channels** tab.
2. Click **View Channel** from the Options column of the channel you wish to modify.
3. Click **Add New Contact**.
4. Enter the required information (identified by an asterisk * and red font).
5. Click **Save**.

> **RESULT:**
> You have successfully added a contact for this channel.

Deleting a Channel Contact

Trading Partner Administrators must designate people to be contacted by the Covisint application administration team in the event of an emergency issue. Each **channel** must have one or more contact names listed. These contact names are used if there is an outage, a messaging delivery issue, or if the Covisint **hub** Disaster Recovery (DR) plan has been invoked. This is your organization's contact, the person who is responsible for this channel.

Complete the following steps from the Connection Channels screen to add a new contact person to a channel. If there is not more than one contact listed, you will not be able to delete the contact without first adding a new contact.

1. From the Channels menu, click the **Connection Channels** tab.
2. Click **View Channel** from the Options column of the channel you wish to modify.
3. From the Delete column of the selected contact person, click **Delete**. The confirmation box is displayed.
4. Click **OK** to confirm edits to this contact.

> **RESULT:**
> You have successfully deleted a contact for this channel.

Modifying a Channel Contact

Trading Partner Administrators must designate people to be contacted by the Covisint application administration team in the event of an emergency issue. Each *channel* must have one or more contact names listed. These contact names are used if there is an outage, a messaging delivery issue, or if the Covisint *hub* Disaster Recovery (DR) plan has been invoked. This is your organization's contact, the person who is responsible for this channel.

Complete the following steps from the Connection Channels screen to add a new contact person to a channel.

1. From the Channels menu, click the **Connection Channels** tab.
2. Click **View Channel** from the Options column of the channel you wish to modify.
3. From the Edit column of the selected contact person, click **Edit Contact**.
4. Edit the contact's information as desired, then click **Save**.
5. Click **OK** to confirm edits to this contact.

RESULT:
You have successfully edited a contact for this channel.

REPORTS

An Overview of Reports

The following table describes all of the reports available within the Connect application:

Report Type:	Definition...
Trading Partner Management Report	A report that summaries your various trading partner relationships.
Transaction **Report**	A report that summarizes the transactions that are currently available online. You can enter specific criteria to limit the content of the report. Transactions must be at least one day and less than 15 days old to be included in this report.
Usage Report	A report that summarizes all transactions sent and received during a specific month. You can view the past 13 months.

(i) Reports are generated per profile. Refer to <u>Switching Profiles</u> for further information.

Generating Reports

Complete the following steps to generate a report.

1. From the **Reports** menu, click the tab of the <u>report type</u> you wish to generate
2. Set report filter criteria as desired.
3. Select the Report Format from the dropdown list. Options include:

   <u>HTML Report</u> – generates an HTML-style report for online viewing.

   <u>PDF Report</u> – generates a report in Adobe Acrobat format.

   <u>Excel Format</u> – generates a report in MS Excel format – which can be saved to your desktop.
4. Click **Generate Report**. The report is generated based upon your filter criteria, in the report format that you selected.

RESULT:
You have successfully generated a report.

A

acknowledgement: A trading partner that receives a message may send a message back to the sender to confirm that the original message was successfully received. The return transaction is called an acknowledgement. Covisint supports functional acknowledgements, such as X12 997 and EDIFACT CONTRL, as well as application-level acknowledgements, such as the X12 824 and the EDIFACT APERAK. The Covisint Connect system sometimes abbreviates acknowledgment to "ack."

administrator: A user role defined in the Covisint Connect user interface. Administrators are responsible for creating and managing all components of the application. They managing transactions, create and manage trading partner relationships, set up and maintain routing and carbon copy rules, create and manage channels and associated rules, generate reports and administer trading partner profiles, users and notifications.

archive data: The archive is an offline storage area for older messages. Current Covisint Connect policy archives messages between 15 and 60 days old. Trading partners may request archived transactions to be restored into the online environment. There are rules and potential costs associated with this type of request.

B

basic user: A user role defined in the Covisint Connect user interface. Basic users are responsible for managing transactions, generating reports and administering notifications.

C

carbon copy: An exact duplicate of a message that is forwarded to a trading partner other than the originally intended recipient. The messaging hub replaces the original sender and receiver codes in the message with the new sender and receiver codes, as defined in the carbon copy rules.

carbon copy rules: Commands are based on sender/receiver codes and document types that identify what messages or transactions need to be carbon copied, and to what new trading partner. A trading partner can configure these commands in the Covisint Connect user interface, and the messaging hub will implement the commands.

channel: A connection method to transmit or receive documents. Current options include FTP, HTTP(S) and WebSphere MQ.

code pairs: When setting up a relationship, a trading partner must define the sets of sender/receiver codes that are valid for transmitting messages under this relationship. These are called code pairs.

compound message: A message that contains multiple documents. The messaging hub will first recognize and separate the documents before routing them to the appropriate trading partner(s).

control number: An alphanumeric transaction identifier assigned by the sender. It is located in the transaction header.

custom processing: Trading partner-specific logic implemented in the messaging hub for processing documents in non-standard manners. Examples of custom processes include parsing, clipping or culling, non-standard splitting, customer-specific logic based on sender/receiver code or document type, duplicate checking and customer-specific security algorithms.

D

direction: When exchanging messages, a trading partner SENDS messages they created, and RECIEVES messages created by their trading partners. Direction refers to whether a trading partner is sending or receiving a messages through a particular connection method.

document: Business data that is a collection of data that is delivered in a specific format. Business documents include purchase orders, material releases, advanced shipping notices and invoices. In the automotive industry there are more than 100 document types, although many are not widely used. The most widely used documents in the automotive industry are the material replenishment documents; these are the forecast, material release and shipping notification. In X12, a material release is called an "862." In EDIFACT, it is called a DELJIT and in the OAGIS XML BOD, it is called a SyncShipmentSchedule.

document format: Standards organizations create common formatting for common business documents, such as ASNs - advanced shipping notices. A document format is the designation that identifies a set of standard documents, such as ANSI X12, EDIFACT and Odette.

document type: It is a designation defined by a standards organization to inform trading partners what type of standard business document is represented. For example, an 856 document type under the X12 standard format or a DESADV document type under the EDIFACT standard format. In OAGIS XML, the document type would be a ShowShipment.

document version: Standards organizations create and maintain document formats and publish versions that contain updated document types. Identifying the version enables a receiver to properly read a specific business transaction.

DUNS: Dun and Bradstreet's Data Universal Numbering System offers companies unique nine-digit codes that help other companies identify and keep track of them.

E

envelope: The transmission header and trailer enclosing an EDI message or other transaction.

error transaction: A transaction that could not be fully processed by the hub. Usually, this means the intended recipient did not receive the message.

H

header: The portion of the message or transaction that precedes the actual body and trailer of the business document.

hub: The Covisint Connect system that receives, processes, and sends trading partner's transactions according to the configurations set up by the trading partners.

I

interconnect: See VAN Interconnect

K

KC: Acronym for kilo-character (1,000 characters). One character equals one byte. See also kilocharacter.

kilocharacter: Also KC or kilocharacter. One kilo-character (KC) equals 1,000 characters. One character equals one byte.

M

mailbox: A channel that supports a trading partner pushing transactions to the messaging hub and getting transactions back from the hub. Technically, a trading partner's computer connects to the messaging hub to drop off and pick up transactions.

maintenance window: The date and time frame when a trading partner's system that sends and/or receives transactions may be unavailable because of scheduled upgrades or necessary maintenance.

mapping: also known as transformations. This is the Covisint Connect service that provides translation services and adds maps to the messaging hub to enable translation from one document format/version to another. In EDI, there is system-to-document mapping and document-to-document mapping. System-to-document mapping is the association of data field contents from an internal computer system such as purchasing to the document field contents in the EDI standard being used. The same mapping takes place in reverse during the receipt of an EDI document. Document-to-document mapping is the association of data field contents of one standard with the fields in the equivalent document of another standard. The mapping process may also apply customer-specific rules and data conversions, such as converting units of measure or checking for required fields.

mapping rule: Maps are mechanisms that allow trading partners' documents to be translated from one format to another. Covisint provides any-to-any mapping and monitor translations, notify users of error conditions and work with users to resolve translation issues.

maps: Maps are mechanisms that allow trading partners' documents to be translated from one format to another. Covisint provides any-to-any mapping and monitor translations, notify users of error conditions and work with users to resolve translation issues.

message: A specific document (or group of documents) for a particular business need.

message hub: See Hub

message ID: A unique identifier assigned by the hub to an individual transaction.

message payload: See Payload

message priority: Transactions are given the priorities of Urgent, Important, or Batch based on the document type. This is a feature of Covisint Connect that allows documents with time-critical business purposes to not be slowed down by larger, less time-critical documents. Message priorities were defined by the Covisint Messaging Consortium.

messaging user: This user is able to view all screens and tabs within the application, but cannotperform any functionality, nor make changes to any configuration. This is a read-only role.

N

notification: A note sent by the Covisint Connect system in response to an error event. Notifications are sent via e-mail to an e-mail account, text pager or mobile phone.

notification frequency: Trading partners can define how often they want notification contacts to receive notifications. Configuring this time interval allows trading partners to reduce the number of redundant error notifications they receive.

P

payload: The Payload is the actual document(s) being exchanged. The payload is "wrapped" in an envelope that the Covisint Connect messaging hub reads. Think of the mail: the payload is the actual letter inside; the "header"/"wrapper" is the envelope that explains how to deliver or process it.

payment account: A financial record Covisint uses to bill trading partner costs. It can be assigned to trading partner profiles and connection methods. This could be a credit card or invoice billing location.

persistent channel: A connection method that supports an open connection between the messaging hub and the trading partner, allowing the system to send and/or receive transactions near real-time.

priority: See Message Priority

production sender/receiver code: It is a live, active code that is used by senders and receivers. Trading partners identify each other and create relationships based on sender and receiver code pairs.

Q

qualifier: A data element which gives a generic segment or a generic data element a specific meaning. In the Covisint Connect system, qualifiers identify the specific sender/receiver code category. For example, the qualifier "01"

represents DUNS and the qualifier "ZZ" represents a mutually-defined code standard.

R

received transaction: A transaction that was sent from one of your trading partners to you.

receiver code: See Sender/Receiver code.

redelivery: A trading partner administrator can select to have a transaction redelivered. This causes the hub to resend the transaction to the receiver's connection channel.

routing rule: A system command that defines what connection channel the Covisint hub should use for a received transaction.

S

segment: A group of logically related data elements in a defined sequence. Segments have a predetermined segment identifier that comprises the first characters of the segment.

sender/receiver code: Typically, a trading partner's sender/receiver code is a DUNs number, telephone number or a code assigned by a customer. A trading partner's sender/receiver code can be any number as long as it complies with Covisint Connect parameters. Some trading partners have multiple sender/receiver codes that identify where to send documents. For example, a trading partner may have trading partner codes that identify different divisions or plants within the company.

sender/receiver code qualifier: Typically, a trading partner's sender/receiver code is a DUNs number, telephone number or a code assigned by a customer. A trading partner's sender/receiver code can be any number as long as it complies with Covisint Connect parameters. Some trading partners have multiple sender/receiver codes that identify where to send documents. For example, a trading partner may have trading partner codes that identify different divisions or plants within the company.

sent transaction: A transaction that you sent to one of your trading partners.

T

test sender/receiver codes: A sender/receiver code identifying messages that are only used for testing purposes and will not be considered for business actions.

trading partner: An operational group that has profiles in Covisint Connect with unique sender/receiver codes.

trading partner administrator: A user assigned to manage trading partner profiles, connections and relationships within Covisint Connect.

trading partner code: See Sender/Receiver code

trading partner messaging user: see messaging user

trading partner name: A name assigned by a trading partner to a specific trading partner profile. A trading partner name should identify the trading partner in a unique manner so other trading partners can search and locate this profile in the hub.

trading partner profile: A data structure in the Covisint Connect messaging hub identified by a unique set of sender/receiver codes under a corporate organization. All administration and maintenance by trading partner administrators is executed through trading partner profiles. Relationships with other trading partners are made at the profile level. Profiles can be associated with multiple connection channels, but only one payment account.

trading partner relationship: An approved association between two trading partners. Trading partners must first establish a relationship to exchange messages with each other. A relationship defines the sender/receiver codes that are valid for exchanging documents between the two trading partners.

transaction: Any data file sent between trading partners. Transactions can contain one or multiple documents.

transaction set: An EDI term used to describe a single document (purchase order, invoice, etc.). The data included in a transaction set will convey the same information as a conventional business document.

transaction type: Identifiers that specifies the technical nature of a transaction as processed by the hub, such as a compound transaction, single transaction or a carbon copy transaction.

transformation: also known as mapping. This is the Covisint Connect service that provides translation services and adds maps to the messaging hub to enable translation from one document format/version to another. In EDI, there is system-to-document mapping and document-to-document mapping. System-to-document mapping is the association of data field contents from an internal computer system such as purchasing to the document field contents in the EDI standard being used. The same mapping takes place in reverse during the receipt of an EDI document. Document-to-document mapping is the association of data field contents of one standard with the fields in the equivalent document of another standard. The mapping process may also apply customer-specific rules and data conversions, such as converting units of measure or checking for required fields.

translation: The process of converting business documents from an application format to a standard EDI format and from a standard EDI format to an application format.

V

view-only user: A user role defined in the Covisint Connect user interface. View-only users can view all screens and tabs within the application, but cannot perform any functionality, nor make changes to any configuration. This is a read-only role.

INDEX