Using the Functional Acknowledgement (FA) Dashboard

Table Of Contents

Getting Started	1
Basic User Tasks	3
Viewing the Dashboard	3
Configuring Your Settings for Dashboard Configuring Email Alerts and Frequency	6 8
Viewing a Transaction and Message Details	12
Viewing Acknowledgements of a Specific Status Type	15
Viewing Messages for a Given Date Range	16
Downloading the Message Payload	17
Locating the Original Message Associated to the Functional Acknowledgement	18
Searching for a Message by External Reference Number	19
Redelivering an Outbound Message	
Trading Partner Administrator Tasks	21
Trading Partner Administrator Tasks	21
Setting Timing and Expectancy of Acknowledgements for Dashboard	22
Manually Marking an Acknowledgement as Accepted or Rejected	24
Adding New Users to Dashboard	26
Modifying Users Dashboard Access	
Frequently Asked Questions	35
What Happens When?	35

GETTING STARTED

This support material assumes the user has a working knowledge of EDI and a clear understanding of standard EDI terminology.

Before using the *Functional Acknowledgement (FA) Dashboard*, your User ID must meet all of the following requirements:

√If you are a Dashboard User, then you:

- have a portal login ID and password
- are a member of intended Trading Partner profile in CCA (Note: In order to be a Dashboard Administrator for your Org, you must be a Covisint Connect Trading Partner Administrator)
- have requested and been approved for the FA Dashboard service package
- have been added to the FA Dashboard by the Dashboard Administrator (after being approved for the FA Dashboard service package)

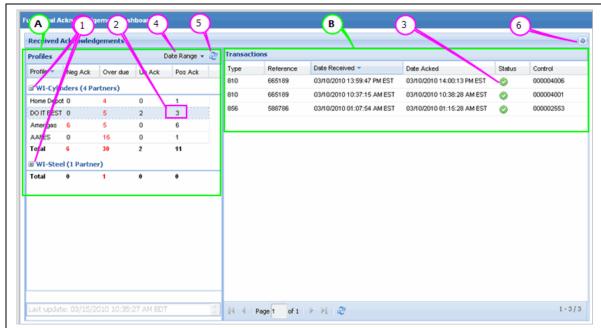
VIf you are a Dashboard Administrator, then you:

- will perform all tasks of the basic user in addition to the Administrator tasks
- must also be assigned the role of Connect TP Administrator in the intended TP Profile
 within Connect in order to administrate the Functional Acknowledgement (FA) Dashboard
 (Note: Dashboard Administrators are only able to administrate users and view data of
 the TP Profiles for which they are Trading Partner Administrators in Covisint Connect)
- have added users as appropriate to the FA Dashboard

BASIC USER TASKS

Viewing the Dashboard

The dashboard assists in monitoring outbound transactions to ensure trading partners receive their EDI data. Also monitors whether trading partners successfully translated the data. It is designed to reconcile all types of sent X12 and EDIFACT EDI messages with positive and negative acknowledgements received (or not received) from the message recipients. Correlation is done via the GS ST Control Number.



At the bottom of the dashboard is date and time stamp of the last time the portlet was refreshed. (auto-refreshes approximately every 15 minutes).

Column A Headers - The numbers in the Columns of section A represent the count for each available status and trading partner.

Profile - contains the available Business Units/Profiles and their Trading Partners

Negative Acknowledgements (acks)indicates the total number of messages for
which negative acks have been received

Overdue - indicates the total number of messages for which acks have not yet been received and has exceeded predefined time limit

Unacknowledged Acknowledgementsindicates the total number of messages that fall under the following events:

> Message Delivered to trading partner, No ack received (no time limit or expectation set)

Message Delivered to trading partner, No ack received (still within time limit)
Failed in ConnectAwaiting Delivery
Positive Acknowledgements- indicates the total number of messages for which expected positive acks has been received

ITEM NUMBER	DEFINITION:
Section A	Acknowledgment status summary displayed in left column. Sort items by clicking on a column heading. Set filters within Section A, the results of which are displayed in Section B.
Section B	All related messages of the acknowledgement (as filtered in section A) is displayed in right column. Sort items by clicking on a column heading.
1	Trading Partner Profile - The user in this example has access to view data in two TP Profiles within their own Org. Click + next to the TP Profile name to view details. As shown, there are four partners within the TP Profile selected
2	Click an item within a column in section A to view details in section B of the screen. In this example, within the TP Profile selected,
	there are four trading partners
	 three positive acknowledgements have been received from the Do It Best trading partner
	• the user has clicked on the number "3" in the Pos Ack column, and details of each are displayed in section B
3	In this example, there are three messages displayed in which positive acknowledgements have been received from TP Do It Best. Double-click on the status icon to view message details.
4	Filters - Allows user to filter left Summary side by date range and status. Initial filtering is based on User Settings.
5	Refresh icon - update your view of dashboard data by clicking refresh.

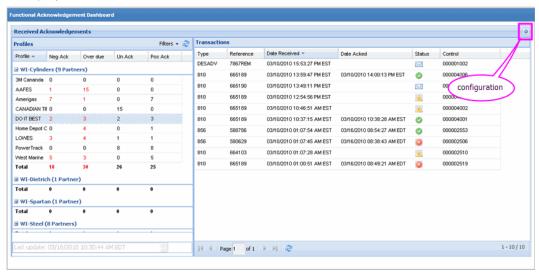
ITEM NUMBER	DEFINITION:
6	Configuration icon - Configure your personal view of the dashboard via the Configuration icon. Users are able to configure the following settings per TP Profile:
	Email alerts and frequency of emails
	 View Timing and Expectancy - (View only - basic users cannot configure) View acknowledgement timing and expectancy settings for trading partners as set by the Administrator
	 User Settings - Set your default left Summary side filtering. Each time you log in, your view of the dashboard will reflect the settings as configured in this tab.

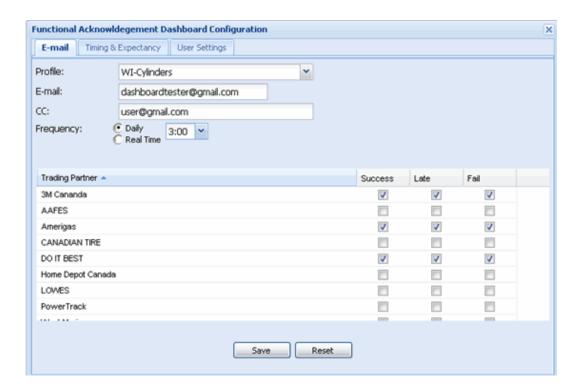
Configuring Your Settings for Dashboard

Configuring Email Alerts and Frequency

Complete the following steps to configure your email alerts and frequency for transactions viewed in the Dashboard.

1. Click the configuration icon on the Dashboard. The Dashboard Configuration screen is displayed.





2. Verify that the **E-mail** tab is selected, then select the profile for which you wish to set email alerts from the drop down menu.



You are not able to modify the email address field. This address is pulled from your portal user ID profile. IF you need to change your email address, you must edit your user profile within the portal administration tool.

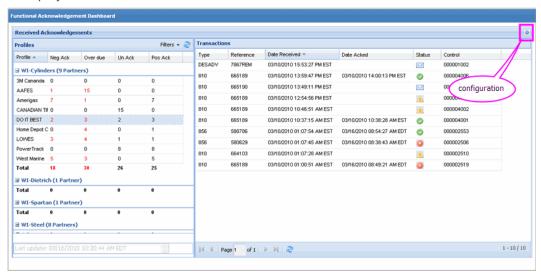
- 3. Optionally, add additional email addresses in the CC: field. Separate each email address by a comma.
- 4. Enable the frequency radio button to indicate how often you wish to receive alerts:
 - Real Time e-mail is sent at time of occurrence
 - Daily (at a specified time) One e-mail received per day at time you specify via the time drop down menu. The e-mail contains alerts that occurred one day prior.
- 5. For each trading partner displayed in this profile, enable the check box of each status type for which you wish to receive email notifications.
- 6. Click Save.

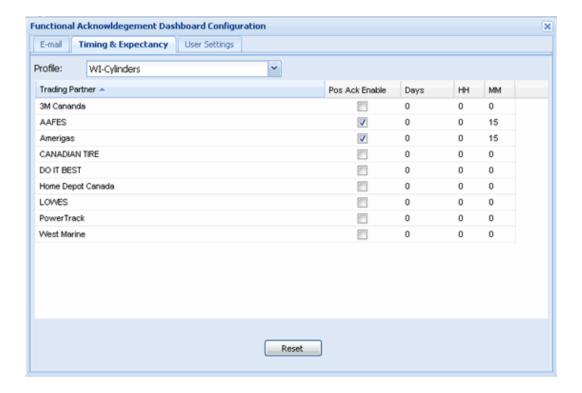
RESULT

You have successfully configured email alerts and frequency.

Viewing Timing and Expectancy of Acknowledgements

1. Click the configuration icon on the Dashboard. The Dashboard Configuration screen is displayed.





2. Click **Timing & Expectancy** tab. The timing and expectancy tab indicates whether acks are expected and the required time in which they are expected to be returned after the original message was delivered to the trading partner.



This is view-only information. You must be a Profile Administrator in this Dashboard in order to modify this tab.

- 3. Select the profile for which you wish to set Timing and Expectancy from the drop down menu. The screen refreshes, and the timing and expectancy per trading partner (as set by the TP Administrator) is displayed.
- 4. View as desired.

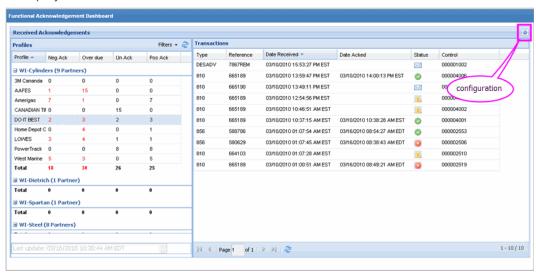
RESULT:

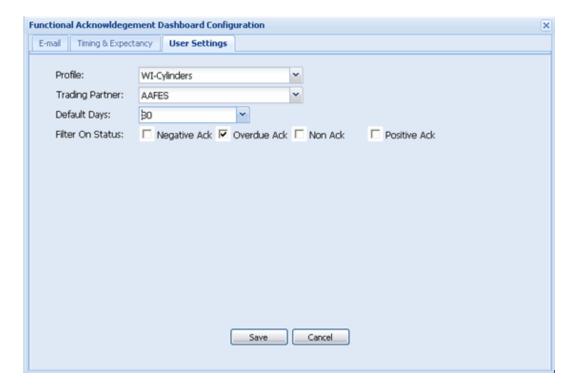
You have successfully viewed timing and expectancy of acknowledgements.

Setting Your Default Dashboard View

Complete the following steps to configure your default Detail (right side) and Summary (left side) filtering in the Dashboard. Each time you log in, your view of the dashboard will reflect the settings as configured in this tab. This gives users the ability to only view the data with which they are concerned.

1. Click the configuration icon on the Dashboard. The Dashboard Configuration screen is displayed.





- 2. Click User Settings tab.
- 3. From the drop down menu, select the Profile view you wish to view.
- 4. From the drop down menu, select the Trading Partner you wish to view as the default on the Detail side of the screen upon each login.
- 5. From the drop down menu, select the number of days worth of transactions you wish to view in the Summary side of the screen upon each login.
- 6. Enable the check box of each status type you wish to set in your default view. (Any or all of the items can be selected).
- 7. Click **Save**. The screen closes and your default settings are saved and will be displayed upon your next login.

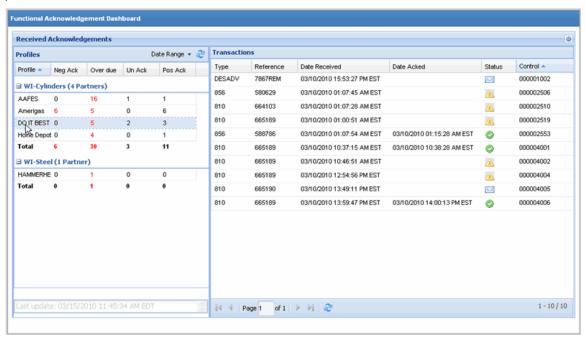
In the example above, the user would see all instances of Overdue Acks over the last 90 Days for all of the user's profiles and Trading Partners. AAFES under WI-Cylinders would be selected and the associated messages would be shown on the Detail side.

RESULT:

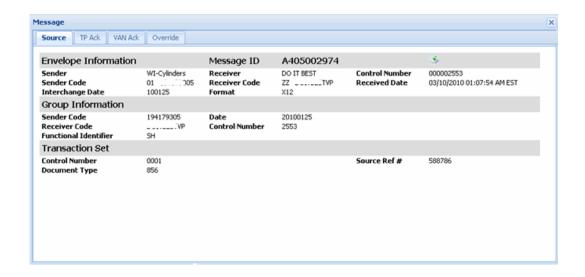
You have successfully set your default dashboard view.

Viewing a Transaction and Message Details

Complete the following steps to view identified acknowledgements for a selected trading partner profile.



- 1. In the FA Dashboard, click + next to the profile in the Summary (left) section of portlet for which you wish to view acknowledgements.
- 2. Optionally, select the date range by clicking the Date Range drop down menu.
- 3. Perform one or more of the following:
 - Click on the trading partner's name to view all acknowledgements received.
 (This example uses Do It Best trading partner). All related messages appear in the Details (right) section of the portlet.
 - Click on the number (count) in the status type column of the acknowledgement.
 This enables you to narrow your view to only those transactions within the status type selected. All related messages appear in the Transactions (right) section of the portlet.
- 4. Double-click on a transaction message in displayed in the Transactions (right) section of the portlet. The Message Details window is displayed.



TAB DEFINITION:

Source Source tab displays details of the document including:

- Download icon (only present if data is available in message tracker database)
- Connect Message ID
- Envelope Information
 - Sender Name and Code
 - Receiver Name and Code
 - Control Number
 - Interchange and Received Dates
 - Format
- Group Information
 - Sender and Receiver Codes
 - Date
 - Control Number
 - Functional Identifier
- Transaction Set Details
 - Control Number
 - Source Reference Number
 - Doc Type

TP ACK Displays details of the Acknowledgement (if received) including:

- Download icon (only present if data is available in message tracker database)
- Connect Message ID
- Envelope Information
 - Sender Name and Code
 - Receiver Name and Code
 - Control Number
 - Interchange and Received Dates

- Format
- Group Information
 - Sender and Receiver Codes
 - Date
 - Control Number
 - Functional Identifier (GS01)
- Transaction Set Details
 - Transaction Set
 - Control Number
 - Acknowledgement Status
 - Doc Type

VAN Ack

Displays the details of VAN Acknowledgement, including:

- Mailbag Number
- Status
- Interconnect Acknowledgement Timestamp
- Mailbag message ID
- VAN Ack Message ID

Override

Provides the ability to override a status

- ID of person who performed an override
- Open text box to document reason of Override
- Date/Time Stamp of when override was performed
- Save/Cancel Button



Important Notes:

- Override is reconciled when the dashboard is reconciled.
- You can Override an Override (If FA arrives after override, it will override the override)

RESULT:

You have successfully view a transaction and details. This is a view-only dashboard. Users must log in to Covisint Connect in order to redeliver an outbound message to a Trading Partner (for example, when a missing or negative acknowledgement is received).

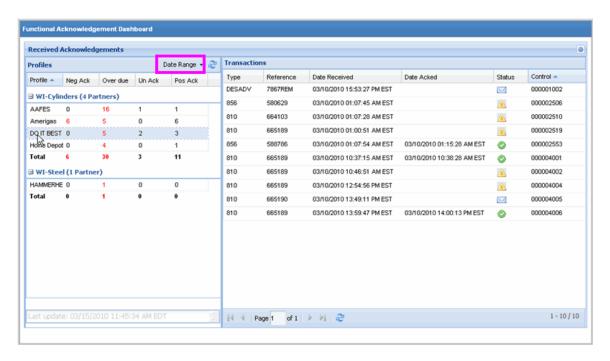
Viewing Acknowledgements of a Specific Status Type

The system enables users to view acknowledgements by status type including negative, unacknowledged, overdue, and positive acknowledgements.

Refer to the topic Viewing a Transaction and Message Details for details >>>

Viewing Messages for a Given Date Range

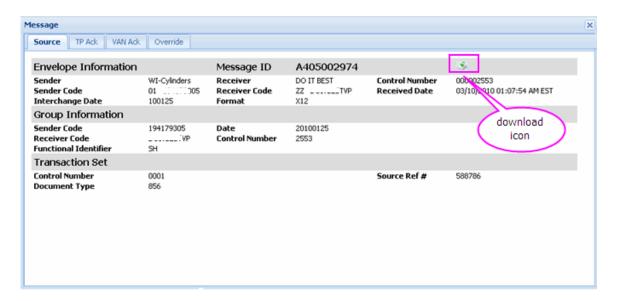
The system enables users to view past acknowledgements by selecting the date from the Date Range drop down menu.



Refer to the topic Viewing a Transaction and Message Details for details >>>

Downloading the Message Payload

The payload of the original message associated to an FA is available for viewing and downloading within the dashboard. By double-clicking on the transaction message as displayed in the Transactions (right column) of the dashboard, a download icon is displayed for the selected message payload.



Refer to the topic Viewing a Transaction and Message Details for details >>>

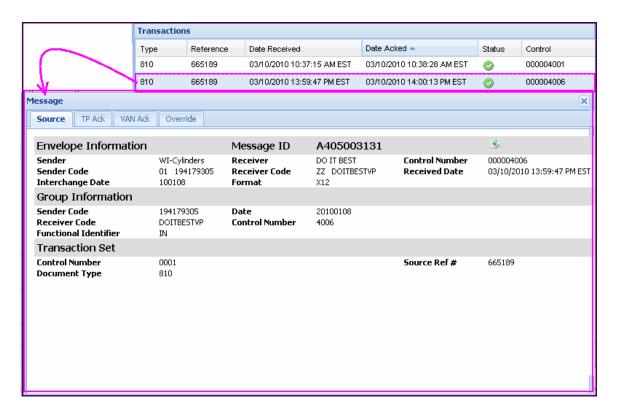


The download icon is also available for the acknowledgement payload on the TP Ack tab.

Locating the Original Message Associated to the Functional Acknowledgement

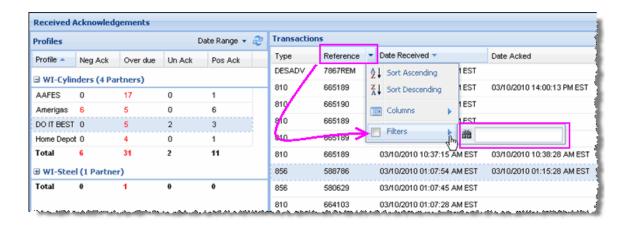
The original message associated to an FA is available for viewing within the dashboard by double-clicking on the transaction message as displayed in the Transactions (right column) of the dashboard.

This example displays the message details of the accepted 810 Transaction, control number 000004006. Refer to the topic Viewing a Transaction and Message Details for definitions of the tabs available on the message details screen >>>



Searching for a Message by External Reference Number

Complete the following steps to check status of a message sent using External Reference Number.



- View the transaction details for the profile in which you wish to search.
 [€]
 Refer to the topic Viewing a Transaction and Message Details for details >>>
- 2. Click the drop down arrow on the **Reference** Column. The menu is displayed.
- 3. Hover mouse over Filters option. The search open text box is displayed.
- 4. Key in the external reference number in the open text box. The screen auto-refreshes, and messages related to the external reference number is displayed.
- 5. Clear the check box next to **Filters** when you have finished your search to disable the filter.

RESULT:

You have successfully searched for a message by external reference number.

Redelivering an Outbound Message

This is a view-only dashboard. Users must log in to Covisint Connect in order to redeliver an outbound message to a Trading Partner (for example, when a missing or negative acknowledgement is received).

TRADING PARTNER ADMINISTRATOR TASKS

Trading Partner Administrator Tasks

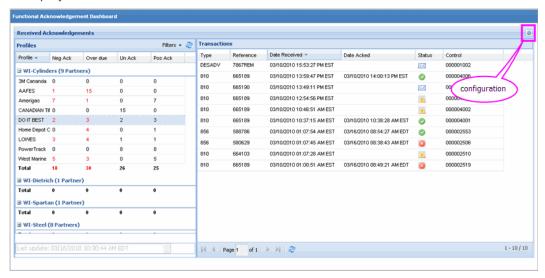
In addition to performing all tasks of the basic user, the Trading Partner Administrator has additional responsibilities, including:

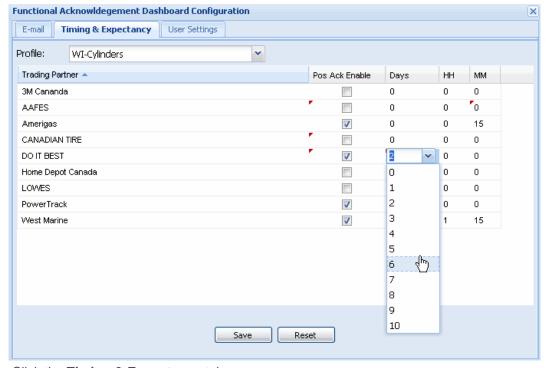
- Setting timing and expectancy of acknowledgements for the dashboard
- Overriding acknowledgements (manually marking an acknowledgement as Accepted or Rejected, or adding comments).

Setting Timing and Expectancy of Acknowledgements for Dashboard

Dashboard Administrators are able to set timing and expectancy thresholds for positive acknowledgements.

1. Click the configuration icon on the Dashboard. The Dashboard Configuration screen is displayed.





2. Click the **Timing & Expectancy** tab.

- 3. Select the profile for which you wish to set timing and expectancy thresholds from the drop down menu.
- 4. Enable the check box of each trading partner from whom you expect a positive acknowledgement. By default, when a new Trading Partner is posted to the Dashboard all Timing & Expectancy settings are enabled. If a positive acknowledgement is not expected, deselect each check box as appropriate.
- 5. For each acknowledgement enabled, select the threshold for day, hours, and minutes from the drop-down menu next the number in a given column.
- 6. Click Save.
- 7. Repeat steps 3 6 per profile.

RESULT:

You have successfully set timing and expectancy of acknowledgements.

Manually Marking an Acknowledgement as Accepted or Rejected

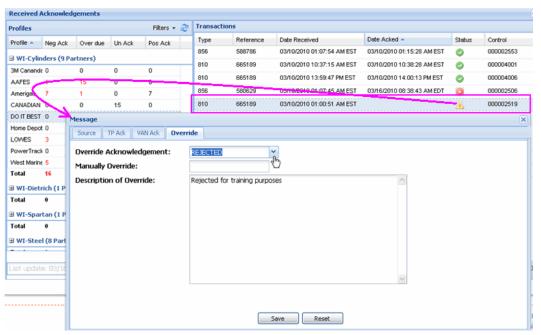
Complete the following steps to manually update the status of an acknowledgement. This is particularly useful when delivering to a VAN or another non-Covisint Connect trading partner. Manually marked acknowledgements are marked with user ID of the person performing the override as well as the date/time stamp of the event.



You and the system can override an override. For example, if a functional acknowledgement arrives after manually performing the override, the functional acknowledgement takes precedents over the manual override.

1. Navigate to the message details of the transaction you wish to override. This example uses the overdue 810 Transaction, control number 000002519.

Refer to the section entitled Viewing a Transaction and Message Details for details



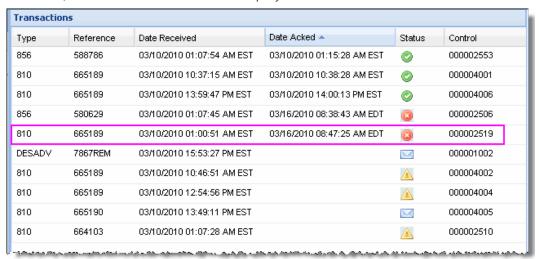
- 2. Click the Override tab.
- 3. Select the appropriate status, either Accepted or Rejected from the drop down menu.



You cannot type directly into the Manually Override field. This field will be populated with the user ID of the person performing the override as soon as the SAVE button is clicked.

4. In the Description of Override field, key in comments as necessary.

- 5. Click Save.
- 6. Click **OK** from the confirmation pop up window. The pop up window is closed.
- 7. Optionally, verify your override by clicking refresh on the dashboard. The screen refreshes, and the new status icon is displayed.

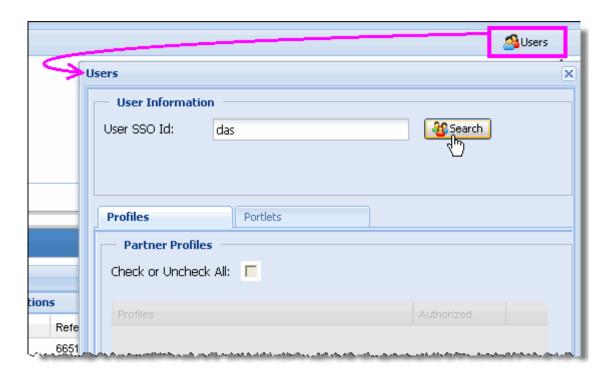


RESULT:

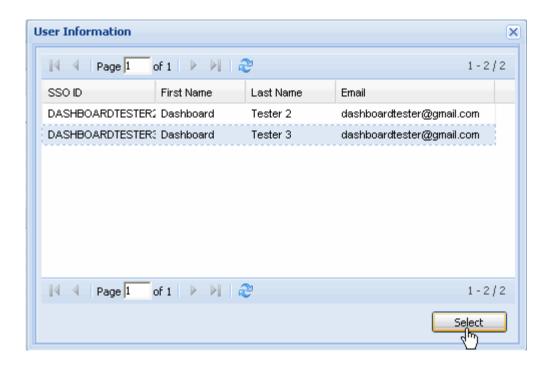
You have successfully performed an override.

Adding New Users to Dashboard

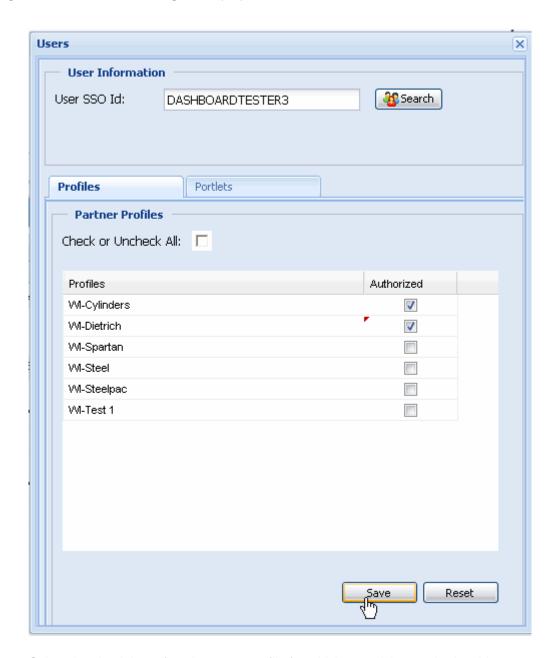
After a user has been granted access to the appropriate Dashboard portal service package, complete the following steps to set access for the user to the appropriate business units (trading partner profiles).



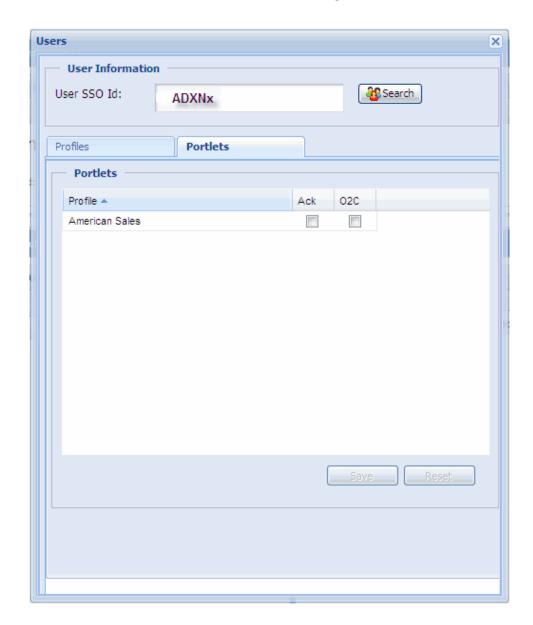
- 1. Click **Users** in top portlet toolbar. The Users administration pop up window displays.
- 2. In the User SSO ID field, enter the user's complete or partial login ID.
- 3. Click **Search**. A list of users matching the search criteria displays.



- 4. Click the row for the user whose account information you want to modify.
- 5. Click **Select**. The User Information Screen is populated with the Covisint Connect Profiles that fall under that user's CCA org.



- 6. Select the check box of each partner profile for which you wish to authorize this user to view transactions on the Dashboard.
- 7. Clear the check box of each partner profile you wish to remove from this user's view on the Dashboard.
- 8. If you wish to allow this user Administrator rights to one or more partner profiles in the Dashboard:
 - a. Click the **Portlets** tab. A list of profiles to which the user has access is displayed, along with the dashboards to which the user has access.



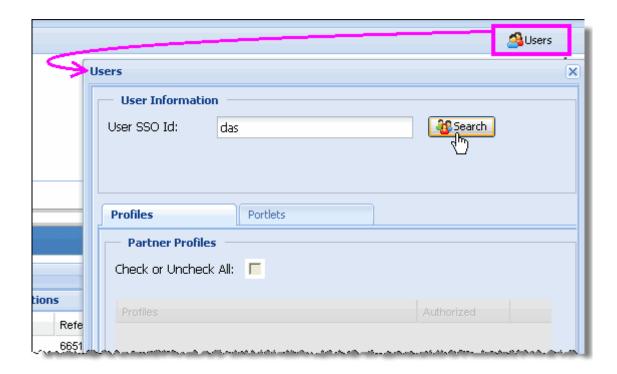
- b. Select the dashboard check box next to each partner profile for which you want to assign Admin rights to this user. The screen shot illustrates a user with access to Ack (Functional Acknowledgement) and O2C (Order To Cash). No administrator rights are assigned in the shot.
- 9. Click **Save**. The system is updated and the user's settings will be reflected upon next login.
- 10. Repeat the steps as required until you are finished adding users.

RESULT:

You have successfully added a user to the Dashboard.

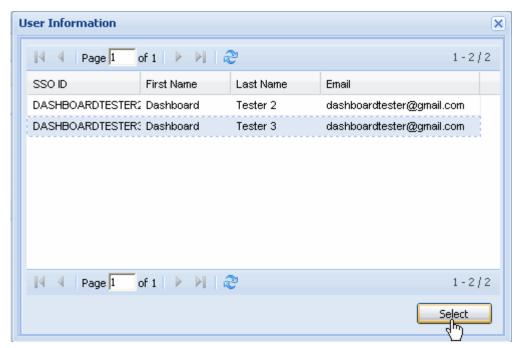
Modifying Users Dashboard Access

Complete the following steps to modify user's access to a Dashboard, partner profiles within a Dashboard, or administrative rights within a Dashboard.

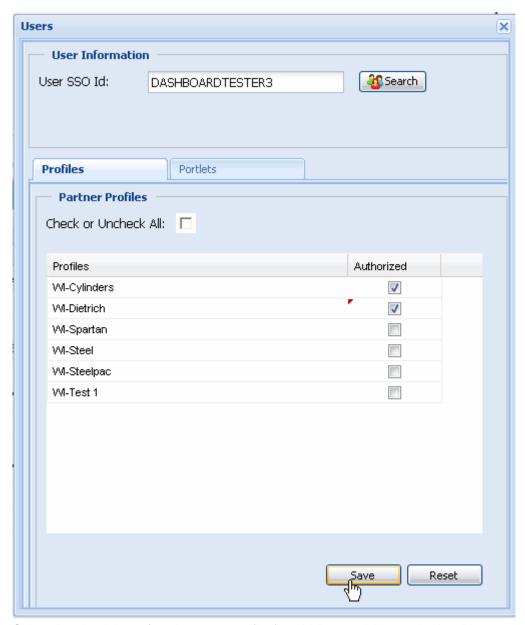


- 1. Click **Users** in the top portlet toolbar. The Users Administration pop up window is displayed.
- 2. In the User SSO ID field, key in the user's login ID (or partial login ID).

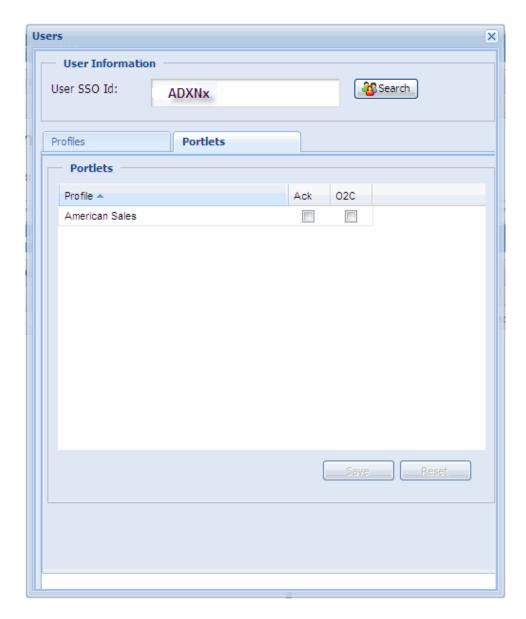
3. Click Search. A list of users matching the search criteria is displayed.



- 4. Click on the name of the user.
- 5. Click **Select**. The User Information Screen is populated with the Covisint Connect Profiles that fall under that user's CCA org.



- 6. Select the check box of each partner profile for which you wish to authorize this user to view transactions on the Dashboard.
- 7. Clear the check box of each partner profile you wish to remove from this users's view on the Dashboard.
- 8. If you wish to modify this user's Administrator rights to one or more partner profiles in the Dashboard:
 - a. Click **Portlets** tab. A list of profiles to which the user has access is displayed.



- b. Select the dashboard check boxes (Ack and O2C in the example) next to each partner profile you want to assign Admin rights for this user.
- c. Clear the check box next to each partner profile you want to remove Admin rights for this user.
- 9. Click **Save**. The system is updated and the user's settings will be reflected upon next login.

RESULT:

You have successfully modified a user's access to the Dashboard.

FREQUENTLY ASKED QUESTIONS

WHAT HAPPENS WHEN...?

... a message is redelivered in Connect?

The existing control number and timestamp will not change, and the most recent acknowledgement overrides any previous acknowledgements.

... a new message is submitted to Covisint to replace a failed transmission?

The message is resubmitted to Covisint Connect, the transaction will receive a new message ID, Control Number, timestamp, and new functional acknowledgements will be generated. The old and new messages and their respective acknowledgements will remain in the Dashboard.

... a message is reprocessed in Covisint Connect?

The message is reprocessed via Covisint Connect, the existing ISA control number remains the same, but the transaction will receive new a ISA timestamp and message timestamp, and new functional acknowledgements will be generated. The most recent acknowledgement overrides any previous acknowledgements.

... a functional acknowledgement arrives after I manually mark it as accepted or rejected?

You and the system can perform an override. For example, if an acknowledgement arrives via the system after manually performing the override, the system-generated acknowledgement takes precedents over the manual override.