GXS

Information Exchange Administration Services User's Guide
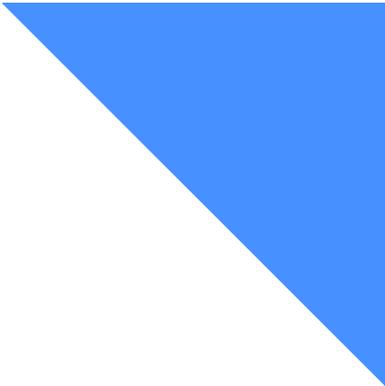
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Contents

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To the reader

. . . .

The term *network* in this book refers to the communications network provided by *AT&T Global Network*.

What this book covers

This book gives step-by-step procedures for using Information Exchange Administration Services.

The following service features are contained in the *Information Exchange Administration Services Supplement*:

- Libraries
- Internet Services
- X.400 Services
- Event Services

Who should read this book

This book is primarily for Information Exchange service administrators who are responsible for coordinating the use of Information Exchange in their companies.

If you are a general user with access to Information Exchange Administration Services, you can also use this book, but be aware that:

- The panels you see may differ from those illustrated in this book.
- You may not be able to do all the tasks described in this book.

This book explains how to use Information Exchange Administration Services to manage the accounts and communications of your Information Exchange users.

How this book is organized

The book has the following chapters and appendixes.

- Chapter 1, "Introducing Information Exchange Administration Services," introduces Information Exchange Administration Services and explains how to set up your account and your users' accounts so that they can communicate with one another and with other users outside of your company.

- Chapter 2, "Interacting with Information Exchange Administration Services," explains how to get around in Information Exchange Administration Services, how to log on and off, and how to work efficiently with the panels.

- Chapter 3, "Understanding the cluster mailbox," explains cluster mailboxes, how to define them, and how to use them to send and receive data through Information Exchange.

- Chapter 4, "Understanding payment level resolution," explains Information Exchange message charges and payment levels for sending and receiving regular messages and for processing and receiving carbon copy messages.

- Chapter 5, "Working with account profiles," explains how account profiles and profile types are set up and how you can use account profiles to make your job easier.

- Chapter 6, "Working with user profiles," tells you how to give a particular user a unique user profile and how to assign profile types to users.

- Chapter 7, "Working with trading partners," describes how to set up and work with your users' trading partners (other users with whom a user can exchange mail).

- Chapter 8, "Working with user groups," tells you how to use user groups to control communications within one account.

- Chapter 9, "Working with alias tables," describes how to set up alias tables to give users a shortcut way to identify each other.

- Chapter 10, "Working with distribution lists," tells you how to set up distribution lists so that you and other users can send the same message to more than one user at a time.

- Chapter 11, "Working with carbon copy relationships," gives an overview of carbon copy relationships, outlines the differences between the two types of carbon copy relationships, and discusses the assignment of charges for carbon copy messages.

- Chapter 12, "Working with carbon copy relationships for all data types," details how to set up and use carbon copy relationships for any type of data.

- Chapter 13, "Working with carbon copy relationships for EDI data types," details how to set up and use carbon copy relationships for the four supported EDI data types.

- Chapter 14, "Creating and sending messages,"details how to address, write, and send free-format messages.

- Chapter 15, "Managing mail for users," describes how to work with messages sent to a user and messages a user has sent.

- Chapter 16, "Working with archived messages," describes how to work with archived messages.

- Chapter 17, "Working with audit trails, session traces, and receive traces," describes how to get audit information for the status of users' sessions, regular messages, and carbon copy messages.

- Chapter 18, "Helping users with problems," tells you how to change or reset a user's password and how to reset a user's session.

- Appendix A, "Time zones," lists the time zones, their abbreviations, and their offsets from Greenwich mean time (GMT).

- Appendix B, "Notices," details the legal notice information for this publication.

This book also contains a glossary and an index.

How to use this book

If you are a new Information Exchange Administration Services user, you may want to read each chapter in this book. If you are an experienced user, but you want help with a new task, you can go directly to the appropriate chapter for the task.

Specific instructions in each chapter tell you the easiest way to complete the task. For example, whenever possible, this book describes choosing the item you want to work with from a list. However, Information Exchange Administration Services is flexible and allows you to move around using fastpaths and various other routes. As you become more familiar with Information Exchange Administration Services, you may want to explore these other methods.

The conventions used in this book are intended to aid your understanding of the printed material. These conventions include:

- The words payment level(s) in this book also refer to the payment options for message charges.

- The actual value typed on a panel is shown in boldface; for example, type **d** next to the message you want to delete.

- The default value is shown in boldface; for example, the default is **blank**.

- The field names on a panel are enclosed within quotes; for example, type a 2-character code in the "Country code" field.

- The panel names are typed as they appear on the panel; for example, look at the Assign a Country Code panel.

- Glossary words are shown in italics the first time used.

Related books

The following books contain information related to the topics covered in this book. For your convenience, these documents can be viewed on the Publications page of the GXS Website at: **http://www.gxs.com**.

Expedite/Async
- *Using Expedite/Async*, GC34-2317

Expedite Base
- *Expedite Base for SCO UNIX Programming Guide*, GC34-2305

- *Expedite Base/AIX for RISC System 6000 Programming Guide,* GC32-3280

- *Expedite Base/DOS Programming Guide*, GC34-2216

- *Expedite Base/MVS Programming Guide*, GC34-2204

- *Expedite Base for Windows Programming Guide*, GC34-2253

- *Expedite Base/2 Programming Guide*, GC34-2213

- *Expedite Base/400 Programming Guide,* GC34-2254

Expedite/CICS
- *Customizing and Developing Applications with Expedite/CICS*, GC34-3304

- *Expedite/CICS Display Application User's Guide*, GC34-3303

Expedite/Direct
- *Using Expedite/Direct*, GC34-2214

Expedite for Windows
- *Expedite for Windows Software Development Kit Programming Guide,* GC34-3285

- *Expedite for Windows Software Development Kit Programming Reference,* GC34-3284

- *Expedite for Windows User's Guide,* GC34-2341

Information Exchange

- *Information Exchange Administration Mailbox Command Reference*, GC34-2260

- *Information Exchange Administration Services Messages and Codes*, GC34-2323

- *Information Exchange Administration Services Supplement,* GN10-4073

- *Information Exchange Charges Reference,* GX66-0653

- *Information Exchange Interface Programming Guide*, GC34-2222

- *Information Exchange Messages and Formats*, GC34-2324

- *Information Exchange via TCP/IP FTP Gateway Quick Reference,* GX66-0664

- *Information Exchange via TCP/IP FTP Gateway User's Guide, GC34-2345*

Summary of changes

The Information Exchange Administration Services procedures covered in this publication include the following changes:

■ **Account profiles**

- Modified the chapter and panels to include the option to allow users in the account to exchange messages with Internet trading partners.

■ **Carbon copy**

- Modified the chapters and panels to include the following options for EDI carbon copy relationships:

    - Support of partner criteria (X12 and UCS only).

    - Allow the recipient to be determined based on values found in the inner or outer envelope.

    - Allow the use of BG01 and BG02 elements instead of BG03 and BG04 elements (UCS only).

    - Allow multiple copies of the same Information Exchange message to be copied to another VAN.

- Modified the chapters and panels to include the option to allow the redirect function in send-side carbon copy relationships.

- Modified the chapters and panels to include the "Last changed on" and "Last changed by" display fields when browsing or changing carbon copy relationships (EDI or all data types).

■ **Creating and sending messages and managing mail for users**

- Modified the chapters and panels to include the option to allow users to exclude system error messages from their lists of inbound messages.

- Modified the chapters and panels to include the expiration date for inbound and outbound messages.

- Modified the chapters and panels to include the option to place messages on hold and remove the hold.

■ **Working with archived messages**

- Modified the chapter and panels to include the EDI control ID and sender ID for archived messages if the data is EDI.

■ **Helping users with problems**

- Modified the chapter and panels to include the date and time the password was last changed in the information about the last active user session.

Introducing Information Exchange Administration Services

. . . .

Welcome to *Information Exchange Administration Services*. This book was designed to assist you in using this interface to *Information Exchange* and performing the varied tasks you may encounter.

Information Exchange Administration Services lets you, the Information Exchange Administrator, coordinate the use of Information Exchange within your company. For example, you can use the Information Exchange Administration Services to set up trading partners for your users so that they can communicate with users in other companies.

Using Information Exchange, users can exchange business documents and messages electronically and in different formats.

This chapter covers the following:

What is Information Exchange?

A component of Interchange Services for e-business, Information Exchange is a commerce engine that provides a common point-of-contact between you, your applications, and your trading partners. Information Exchange is accessed through communication sessions using an interface program running on your computer. You and your trading partners can exchange messages and documents in a variety of sizes, from a small e-mail note to a multi-megabyte file.

You can send and receive information either in the same session or in separate sessions. The information sent to you is stored and can be retrieved later. This eliminates time and schedule constraints, simplifies conducting business across time zones, and prevents missing vital business transactions.

Information Exchange efficiently processes EDI transactions and non-EDI messages, such as:

- Purchase orders
- Invoices
- Computer aided design (CAD) drawings
- Shipping notices
- Catalog updates
- Letters
- Memos

Information Exchange can link the geographically scattered locations of a single company or of different companies. For example, a manufacturing company in one location can use Information Exchange to communicate with its suppliers or distributors in other locations.

What is Information Exchange Administration Services?

Information Exchange Administration Services is a panel-driven interface that you can use to perform administrative tasks for the Information Exchange users you support. To look at some of these tasks, see "What does the service administrator do?" on page 4.

To connect to Information Exchange Administration Services, you need a full-screen emulator product, or a network-attached terminal. The Expedite Licensed Programs, which also interface with Information Exchange, do not provide interactive access to Information Exchange Administration Services.

You must also order both Information Exchange and Information Exchange Administration Services to perform the tasks described in this book.

Information Exchange Administration Services is also available, with limited function, on the Internet at the following URL: **http://www.gxs.com.**

To use Information Exchange Administration Services for the Web, customers are required to have an appropriate Web browser and a connection to the Internet, or a TCP/IP connection using AT&T Global Network. Appropriate Web browsers include the ones listed below; however, the list is subject to change without prior notice:

■ Netscape Navigator 4.0 or functional equivalent
■ Microsoft Internet Explorer 4.0 or functional equivalent

Who are the participants?

Information Exchange can have a variety of users or participants who use its many functions. The participants you will find discussed in the text of this book are:

■ **The service administrator**
This is the user who manages the various types of profiles and assists users with Information Exchange functions.

The Information Exchange Service Administrator coordinates the use of Information Exchange within a company. For example, an administrator can use Information Exchange Administration Services to set up trading partners for users so that they can communicate with users in other companies.

■ **The alternate administrator**
This is the user who can perform some or all of the administrative tasks for an individual user or the users in an account.

■ **The user**
This is any individual who issues and receives commands or processes data through Information Exchange or an Information Exchange interface.

An Information Exchange user has a unique system ID, account ID, and user ID assigned at registration for both same-system and cross-system addressing. This address identifies the user to an Information Exchange mailbox. Access to user information is controlled through Information Exchange Administration Services.

■ **The *trading partner***
This is the business associate with whom a user exchanges electronic messages. These messages can be formatted as EDI or non-EDI.

With Information Exchange*,* users can exchange business documents and messages electronically. Users exchange many different kinds of documents in different formats. For example, users can exchange invoices, purchase orders, financial data, reports, and other types of business documents.

Information Exchange Administration Services lets you, the Information Exchange Service Administrator, coordinate the use of Information Exchange within your company. For example, you can use Information Exchange Administration Services to set up trading partners for your users so that they can communicate with users in other companies.

What does the service administrator do?

As the Information Exchange Service Administrator, you manage user profiles and assist users in performing Information Exchange functions. You are the local expert for the users in your accounts. Users can come to you to resolve the problems they might have using Information Exchange.

As the service administrator, you can:

- Specify the characteristics users can have and with whom they can exchange mail by:
  - Changing the profile types to define sets of users in an account
  - Changing the profiles to define individual users
  - Organizing users into groups for communication within an account

- Help users set up trading partner lists

- Help users send messages more efficiently by setting up and maintaining distribution lists and alias tables.

- Manage mail sent to and from users by:
  - Working with messages
  - Working with archived message groups

- Help users work with *carbon copy* relationships by:
  - Defining carbon copy relationships

- Help users get information about their messages and sessions by:
  - Working with audit trails
  - Working with session traces

- Help users correct problems by:
  - Changing passwords
  - Resetting passwords
  - Resetting sessions
  - Viewing sessions

- Help users create and manage libraries by:
  - Setting up libraries
  - Adding or replacing library members
  - Retrieving library members
  - Searching library members

- Help users set up communications with X.400 users by:
  - Setting up X.400 user profiles
  - Setting up X.400 trading partner attributes

- Help users work with events and set up event profiles by:
  - Working with message arrival, scheduled, and user-initiated definitions
  - Working with event trails

Looking at some typical tasks

The following scenario shows you some typical tasks a service administrator might perform for a user.

Suppose that you want to:

■ Make sure the user's messages are automatically placed in the message archive when received

■ Make sure the messages are retained in the archive for 10 days

■ Set up trading partners for a user

First, you would go into the user's profile to make sure the archiving is set up the way you want.

```
M0000US       Information Exchange Administration Services
                           Main Menu
                        System ID : SY1

        Action 1   Work with one of the following:
                    1. Profiles
                    2. Alias tables
                    3. Distribution lists
                    4. Messages
```

Choose Action 1

You see a panel like this one.

```
M1200US                        List User IDs

   Account ID.............  ACCT1

   Start at Account ID.....  _____  (press Enter)

   Code (multiple selection):
     S = Select user

   _ USER1     _ USER2    _ USER3    _ USER4    _ USER5    _ USER6
   _ USER7     _ USER8    _ USER9    _ USER10   _ USER11   _ USER12
   s USER13    _ USER14   _ USER15   _ USER16   _ USER17   _ USER18
   _ USER19    _ USER20   _ USER21   _ USER22   _ USER23   _ USER24
```

Locate the user you want to work with and type S next to the user ID

```
M1400US                    Work with User Profiles

   Account ID.............  ACCT1     (actions 1 - 3, and 5)
   User ID................  USER13    (actions 1, 2, and 5)
   Profile type...........  __

   Action.................  2  1. Browse a user's profile
                               2. Change a user's profile
                               3. Change multiple users' profile types
                               4. Work with trading partners
```

The user's ID is filled in on the Work with User Profiles menu

Choose Action 2

5

You see a panel like this one.

Make sure that "Forced archiving?" is set to Y and "Archive days" is set to 10

```
M1410US                    Change a User's Profile              (Panel 1 of 3)

Account ID / user ID......  ACCT1    / USER1
Profile type..............  01

As sender (Y/N):
  Pay for sending?... Y   Pay for receiving?... Y   Block communication?... N
As receiver (Y/N):
  Pay for sending?... N   Pay for receiving?... N   Block communication?... N

As carbon copy partner (Y/N):
  Pay for processing?.............. N      Pay for receiving?.............. N
As carbon copy recipient (Y/N):
  Pay for processing?.............. N      Pay for receiving?.............. N

Forced archiving? (Y/N)............ Y      Archive days (Max 365 )......... 010
Authorization level (1-6).......... 4      Number of audit/session/event
Language suffix (Default US )...... US      trail days ( 001  - 045 )...... 015
Cluster mailbox user? (Y/N)........ N      Number of mailboxes (2-99)...... 00


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward  F12=Cancel
```

For more information on working with a user's profile, see Chapter 6, "Working with user profiles."

When you finish with the user profile, you are ready to create a trading partner list.

You follow this path.

```
M0000US            Information Exchange Administration Services
                                  Main Menu
                              System ID : SY1

Action 6    Work with one of the following:
               1. Profiles
               2. Alias tables
               3. Distribution lists
               4. Messages
               5. Audit trails and session traces
               6. Trading partners
               7. Libraries
               8. Events
               9. X.400 services
              10. Carbon copy relationships
              11. Internet services
               X. Exit from Information Exchange Administration Services
```

Choose Action 6

```
M1330US                 Work with Trading Partners

Account ID.... ACCT1              (actions 1 - 9)
User ID....... USER13             (actions 1 - 9)
Specify partner:                  (actions 2 - 7)
  User........ ___ ACCT1    USER1    or
  Alias....... _ ___ _____

Action........ 2    1. List trading partners
                    2. Add a trading partner
                    3. Browse a trading partner
                    4. Change a trading partner
                    5. Delete a trading partner
                    6. Copy a trading partner
```

Fill in the account ID and user ID you want to work with

Fill in a user ID or an alias to identify the trading partner

Choose Action 2

```
M1332US                 Add a Trading Partner

Account ID / user ID. ACCT1    / USER13

Partner:
  User..............    ACCT1    USER1    or
  Alias..............

As sender (Y/N):
  Pay for sending?... Y   Pay for receiving?... N   Block communication?... N
As receiver (Y/N):
  Pay for sending?... N   Pay for receiving?... N   Block communication?... N
As carbon copy partner (Y/N):
  Pay for processing?............. Y    Pay for receiving?............... N
As carbon copy recipient (Y/N):
  Pay for processing?............. N    Pay for receiving?............... Y
Require partner to be ESO? (Y/N)... Y
```

Set payment levels and an ESO option for communications with the trading partners

For more information on setting up trading partner lists, see Chapter 7, "Working with trading partners."

Delegating authority to alternate administrators

There are two kinds of alternate administrators: account alternate administrators and user alternate administrators.

- **Account alternate administrators**

  An account alternate administrator can perform some or all service administrator tasks for an account. When you designate a user as an account alternate administrator, you specify the type of administrator you want the user to be.

This type:	Can do this:
A	All service administrator functions
M	Only view mail for all users in the account
N	All service administrator functions except viewing and deleting mail
S	All service administrator functions except viewing and deleting mail, but can view messages from account ID *SYSTEM*

- **User alternate administrators**

  A user alternate administrator can perform the same tasks for users that the users can perform for themselves. When you designate a user as a user alternate administrator, you specify the type of administrator you want the user to be.

This type:	Can do this:
A	All functions the user can perform
M	Only view mail for the user
N	All functions the user can perform except viewing and deleting mail
S	All functions the user can perform except viewing and deleting mail, but can view messages from account ID *SYSTEM*

You can designate a user from any account to be an alternate administrator for your entire account or for particular users in your account. You can also designate all service administrators from another account to be alternate administrators for your entire account or for particular users in your account.

These tables show what each type of alternate administrator can do when managing mail.

For inbound and outbound mail

Admin type	List inbound/ outbound mail	See add'l info	ViewC DH	View text	Delete msgs	Msg hold/ remove
A	Yes	Yes	Yes	Yes	Yes	Yes
M	Yes	Yes	Yes	Yes	No	No
N	Yes	Yes	Yes	No	No	Yes
S	Yes	Yes	Yes	No, unless from *SYSTEM*	No	Yes

For archived messages

Admin type	List archived messages	See additional info	View CDH	View text	Retrieve from archive	Delete from archive
A	Yes	Yes	Yes	Yes	Yes	Yes
M	Yes	Yes	Yes	Yes	No	No
N	Yes	Yes	Yes	No	Yes	No
S	Yes	Yes	Yes	No, unless from *SYSTEM*	Yes	No

For information on how to designate another user as an alternate administrator for an account, see Chapter 5, "Working with account profiles."

For information on how to designate another user as an alternate administrator for a user, see Chapter 6, "Working with user profiles."

Setting up stricter security

The Extended Security Option (ESO) provides additional password and mailbox security for users. As the service administrator, you specify this option in the "Extended security user" field when you change a user's profile or profile type.

ESO contains the following security enhancements:

■   ESO users' passwords must be reset before an ESO user can log on to Information Exchange Administration Services for the first time.

■   New passwords for ESO users must comply with ESO password rules. For the specific ESO password rules, see "ESO password rules" on page 279.

■   An ESO user ID is revoked if the user makes three consecutive attempts to log on to Information Exchange Administration Services with an invalid password. Any further attempts to log on to Information Exchange Administration Services are unsuccessful until the user ID is reset.

■   To reset an ESO user ID, you must change or reset the ESO password. The ESO user must then provide the new password on the next attempt to start an Information Exchange session or log on to Information Exchange Administration Services.

Finding out which systems you can work with

Information Exchange is installed in multiple locations around the world and is connected to other EDI Services components and non-EDI services. This permits customers to conduct business with trading partners who use other components and services. GXS assigns a unique system ID to every Information Exchange system worldwide.

If you want to communicate with a user who is on another system, you must know the user's 3-character system ID so Information Exchange knows where to send the message.

To look at a list of system IDs, follow this path.

```
M0000US           Information Exchange Administration Services
                                 Main Menu
                             System ID : SY1

  Action 1    Work with one of the following:
                 1. Profiles
                 2. Alias tables
                 3. Distribution lists
                 4. Messages
```

Choose Action 1

```
M1000US                      Work with Profiles

  Account ID..............  ACCT1   (actions 5 - 8)
  User ID.................  USER1   (actions 5 - 8)

  Action.................  1    1. List system IDs
                                2. Work with account profiles
                                3. List user IDs
                                4. Work with user profiles
                                5. Change a user's password
```

Choose Action 1

You may see a panel like this one. It displays the systems that your local Information Exchange system can communicate with.

```
M1010US                      List System IDs

  Start at System ID......  ___  (press Enter)

  Sys ID Description        Sys ID Description        Sys ID Description
   ADV   IEPS/EDI VAN INTER  BRA  BRAZIL               EUR   EMEA/HONG KONG
   IMX   MAIL EXCHANGE       JPN  JAPAN/ASIA PACIFIC   MQS   MQSERIES SERVICES
   SRV   EDI SERVER          USA  US/CAN/LATIN AMER    USQ   AUST/NEW ZEALAND
```

NOTE: EDI Server includes: Web data transfer, forms exchange, and Web application environment.

Interacting with Information Exchange Administration Services

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If you are new to Information Exchange Administration Services, the information in this chapter can help you get started and show you how to work efficiently with the panels.

This chapter covers the following:

Logging on and off

To log on to Information Exchange Administration Services, begin on the Welcome to AT&T panel.

Fill in your account and user ID, if they are not already filled in. Then type your password and press Enter

To go directly to Information Exchange Administration Services, also fill in IE/SERV

```
SVM0401P
SYSTEM: SYS101                                           DATE: 00/02/20
TERMID: TERM100                                          TIME: 15:19:38
CUSTOMER ASSISTANCE: ENTER "NOTIFY" OR CALL 800-727-2222
-------------------------------------------------------------------------------
                           W E L C O M E   T O

              ===     ===============        ===============
              =======  ===============   ==   ===============
         ===   ===         ===          == ==        ===
         ===========       ===         ===   =       ===
         ===========       ===        ====            ===
         ===   ===         ===        == === =        ===
         ===   ===         ===        ==   ==         ===
         ===   ===         ===        ==== ==         ===

                                          Provided by AT&T Global Network
-------------------------------------------------------------------------------
ACCOUNT...           USERID.          PASSWORD...
Enter desired product or service, or press the HELP key (PF1) for assistance.
===> ie/serv
```

If this is your first logon, get your password from your service administrator.

FASTPATH: You can go directly to the Information Exchange Administration Services Main Menu by typing **ie**/**serv** on the command line and pressing Enter.

If you do not type ie/serv on the command line and you press Enter, you see a panel like this one.

Type the number for Information Exchange Administration Services on the command line and press Enter

```
SVM0401P                    PRODUCT SELECTION                   Page    1
SYSTEM: SYS01                                           DATE: 99/02/20
TERMID: TERM100                                         TIME: 15:19:40
CUSTOMER ASSISTANCE: ENTER "NOTIFY" OR CALL 800-727-2222


        PRODUCT          DESCRIPTION         ENTER "NOTIFY" OR CALL
    1   IE/SERV      ADMIN SERVICES          1-800-727-2222
    2   PRODUCT2     PRODUCT 2 DESCRIPTION   1-800-727-2222
    3   PRODUCT3     PRODUCT 3 DESCRIPTION   1-800-727-2222




Enter selection or press the END key before leaving this terminal unattended.

F1=HELP F3=END F5=SERVICES

===> 1
```

You may have to verify your password. Here is the panel where you verify your password.

Type your password and press
Enter

What you type does not
display

To change your password, also
fill in these fields

```
M1800US          Information Exchange Administration Services
                            Verify a User's Password

   Account ID..............   ACCT1
   User ID................   USER1

   Current Information Exchange password.......

   To change your current password:

     New Information Exchange password........
     Verify new Information Exchange password..




   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

If you are a service administrator for an ESO user who is logging on for the first time, the user's password is revoked and you must reset it before the user can log on to Information Exchange Administration Services, Information Exchange Administration Services for the Web, or start an Information Exchange session. For more information, see "Resetting an ESO user's password" on page 278.

Information Exchange verifies your password and, if it is correct, displays the Information Exchange Administration Services Main Menu.

```
M0000US          Information Exchange Administration Services
                               Main Menu
                            System ID : SY1

   Action 3      Work with one of the following:
                  1. Profiles
                  2. Alias tables
                  3. Distribution lists
                  4. Messages
                  5. Audit trails and session traces
                  6. Trading partners
                  7. Libraries
                  8. Events
                  9. X.400 services
                 10. Carbon copy relationships
                 11. Internet services
                  X. Exit from Information Exchange Administration Services

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   Command ===>
   Enter  F1=Help  F3=Exit
```

Type the number of your choice in the "Action" field

Use the command line to type commands or fastpaths

You begin many of the tasks described in this book by choosing actions from this menu. It gives you access to the major functions you use to set up communications and coordinate the use of Information Exchange.

When you are ready to leave Information Exchange Administration Services:

- Type **x** on the command line of the Main Menu and press Enter, or

- Press F3 on the Main Menu, or

- Type **=x** on the command line from any panel in Information Exchange Administration Services.

Getting around in Information Exchange Administration Services

In Information Exchange Administration Services, there are different ways to move through the panels. You can:

- Choose actions from menus
- Use fastpaths to "chain" through the panels
- Use the function keys
- Use the Enter key

Choosing actions from menus

Information Exchange Administration Services gives you menus that contain choices to help you decide where to go. If you are new to Information Exchange Administration Services, using menus may be the easiest way to get around.

Here is an example of how to use menus to choose what you want to do.

When you first log on to Information Exchange Administration Services, you see the Main Menu.

Type the number of your choice in the "Action" field

Use the command line to type commands or fastpaths

```
M0000US          Information Exchange Administration Services
                               Main Menu
                            System ID : SY1

   Action 3    Work with one of the following:
                  1. Profiles
                  2. Alias tables
                  3. Distribution lists
                  4. Messages
                  5. Audit trails and session traces
                  6. Trading partners
                  7. Libraries
                  8. Events
                  9. X.400 services
                 10. Carbon copy relationships
                 11. Internet services
                  X. Exit from Information Exchange Administration Services


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   Command ===>
   Enter  F1=Help  F3=Exit
```

If you want to work with distribution lists, make sure the cursor is in the "Action" field, and then type **3** and press Enter.

You see a panel like this one.

Your account ID and user ID are already filled in

Fill in the information about the item you want to work with

Choose the action you want from the menu and press Enter

```
M4000US                    Work with Distribution Lists

   Account ID........  ACCT1     (actions 1, 2, 3, 4, 5, or 6)
   User ID..........  USER1     (actions 1, 2, 3, 4, 5, or 6 and List Type P)
   List name........  DISTLST1  (actions 2, 3, 4, 5, or 6)
   List type (A/P)...  P         (actions 1, 2, 3, 4, 5, or 6)

    Action...........  3   1. List distribution lists
                            2. Add a distribution list
                            3. Browse a distribution list
                            4. Change a distribution list
                            5. Delete a distribution list
                            6. Retrieve a distribution list
                            7. Work with groups
                            8. Work with trading partners
                            9. Copy a distribution list to a trading partner list




   Command ===>
   Enter  F1=Help  F3=Main Menu  F4=Main Menu
```

When you type information on the panel and press Enter, Information Exchange Administration Services performs the action you specified in the "Action" field for the task you specified in the entry fields.

Using fastpaths (panel chaining)

After you are familiar with Information Exchange Administration Services, you may want to move through the panels more quickly, especially when you are doing more familiar tasks. Information Exchange Administration Services lets you do this by giving you a way to skip directly to the panel where you want to work. You can type multiple actions at the command line on a panel in order to bypass unwanted panels and take a more direct path to the panel you want. This is called chaining through the panels.

Sometimes when you chain through panels, you have to type additional information on a panel in the middle of the chaining sequence. When this happens, Information Exchange Administration Services stops on that panel so you can type information.

After you type the required information and press Enter, you continue chaining through the panels.

You can chain through panels in either of the following ways:

■   From any menu:

Type the action or a combination of actions at the command line. This processes the action starting at the current menu. When combining actions, separate the parts with a period. For example, type **2.1** to go directly to the Browse an Account Profile panel from the Work with Profiles menu.

This is the same as selecting action 2 on the Work with Profiles menu (M1000US), and then selecting action 1 on the Work with Account Profiles menu (M3100US).

```
 M1000US                      Work with Profiles

   Account ID.............   ACCT1    (actions 5 - 8)
   User ID................   USER1    (actions 5 - 8)

   Action.................   __    1. List system IDs
                                   2. Work with account profiles
                                   3. List user IDs
                                   4. Work with user profiles
                                   5. Change a user's password
                                   6. Reset a user's password
                                   7. Reset a user's session
                                   8. Information about last active user session
                                   9. Work with messages




 Command ===> 2.1
 Enter  F1=Help  F3=Main Menu  F4=Main Menu
```

Type 2.1 here
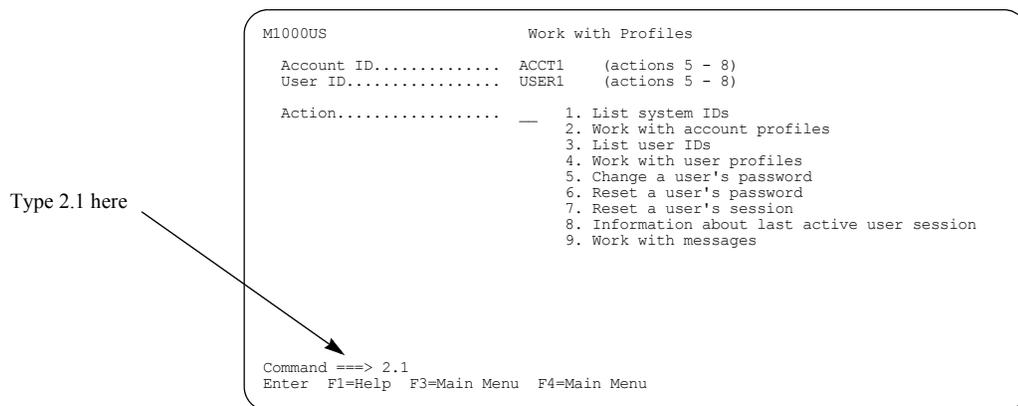
The Browse an Account Profile panel displays.

```
M1350US                      Browse an Account Profile

  Account ID.............  ACCT1

  Allow unrestricted communication within account? (Y/N).........  N
  Allow users in the account to exchange Internet messages? (Y/N)  N

  Account alternate administrators
    Account ID   User ID   Authority (A/M/N/S)
    ACCT1                    A
    ACCT1        USER2       A
    ACCT1        USER3       A


  Profile type (optional)........  __
  Date created-date modified.....  10/07/98 - 02/07/99
  Last user to modify............  ACCT1    - USER1
```

■ Through the Main Menu:

Type = and an action or combination of actions on the command line of any panel or menu. This processes the action as if you started on the Main Menu. When combining actions, separate the parts with a period. For example, type =**10.1** to go directly to the List Carbon Copy Relationships panel from any panel.

This is the same as starting at the Main Menu and typing action 10 to go to the Work with Carbon Copy Relationships menu and then typing action 1 to go to the List Carbon Copy Relationships panel.

```
M1000US                      Work with Profiles

  Account ID.............  ACCT1    (actions 5 - 8)
  User ID................  USER1    (actions 5 - 8)

  Action.................  __   1. List system IDs
                                2. Work with account profiles
                                3. List user IDs
                                4. Work with user profiles
                                5. Change a user's password
                                6. Reset a user's password
                                7. Reset a user's session
                                8. Information about last active user session
                                9. Work with messages




  Command ===> =10.1
  Enter  F1=Help  F3=Main Menu  F4=Main Menu
```

Type =10.1 here

The List Carbon Copy Relationships panel displays.

```
M3810US              List Carbon Copy Relationships

Requester account ID / user ID  ACCT1    / USER4

Codes (multiple selection):
  B = Browse   C = Change   D = Delete   O = Copy

        CC  Data                                       Charges      Purg
Code  Type Type Partner              Recipient         CCP CCR Crit Orig
  _     R    X   X1   IDX01           X2   IDX02         O   P   Y    N
  _     R    X   X1   XID01           X2   XID02         O   R   Y    Y
  _     R    C        IDC01                IDC02         O   P   Y    Y
  _     R    C   ** ALL PARTNERS **        IDC03         P   R   N    N
  _     R    E   EE01 IDE01           EE02 IDE02         P   R   Y    N
  _     R    E   EE05 IDE05           EE06 IDE06         P   P   Y    N
  _     R    E   EI   IDE01           E2   IDE02         P   P   Y    N
  _     R    E   ** ALL PARTNERS **        EID00         P   R   Y    Y
  _     R    U        IDU03                IDU04         O   R   N    Y
```

NOTE: If you get to a panel by chaining through the Main Menu (=action number), pressing F3 takes you back to the Main Menu. If you get to a panel by chaining through a panel other than the Main Menu, pressing F3 takes you back to where you started.

Using function keys

The function keys on your keyboard are a quick way to let Information Exchange Administration Services know what you want to do.

Each Information Exchange Administration Services panel has a list of the function keys you can use on that panel.

For example, there are two function keys available on the Main Menu.

This line shows that F1 and F3 plus the Enter key are available on this panel

```
Command ===>
Enter  F1=Help  F3=Exit
```

Other function keys may be available on other panels.

F8 is available if there is more than one panel and you are not already at the bottom

```
Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F6=Bottom  F8=Forward  F12=Cancel
```

Your keyboard may label the function keys as PF keys (for example, PF3 or PF4). The terms are interchangeable.

If your keyboard does not have function keys, type the name of the function key (for example, **F3** or **PF3)** on the command line and press Enter.

Here is a list of the function keys you use when you work with Information Exchange Administration Services.

Function key:	Description:
F1 or F13	Gets help anywhere in Information Exchange Administration Services.
F2 or F14	Saves your input and continues working on the panel, or adds information for some tasks.
F3 or F15	Saves your changes to a panel and returns to the previous panel. If you are on the Main Menu when you press F3 or F15, you exit Information Exchange Administration Services.
F4 or F16	Saves your changes to a panel and returns to the Main Menu.
F5 or F17	Goes to the top of the text or the top of the list.
F6 for F18	Goes to the bottom of the text or the bottom of the list.
F7 or F19	Scrolls backward through a list or a set of connected panels.
F8 or F20	Scrolls forward through a list or a set of connected panels.
F10 or F22	Goes left 79 characters.
F11 or F23	Goes right 79 characters.
F12 or F24	Cancels your changes to a panel and returns to the previous panel without saving your work.

NOTE: You do not have to press Enter to verify your entries before you press the F2, F3, F4, F5, F6, F7, and F8 keys. Pressing any of these keys tells Information Exchange Administration Services to verify your entries and perform the function assigned to the key.

Using the Enter key

The Enter key performs various functions, depending on what type of panel you are working on.

■ On a menu panel, when you choose an action and press Enter, Information Exchange Administration Services displays the next panel.

■ On a list panel, when you specify only an item with which to start the list and press Enter, Information Exchange Administration Services starts the list with the item you specified.

If the item you specify does not exist, Information Exchange Administration Services may start the list with the next item in the list or display an error message.

■ On a panel where you choose to see other information or perform an action, when you press Enter, Information Exchange Administration Services displays the appropriate panel.

■ On a confirmation panel where you can confirm or cancel an action, when you press Enter, Information Exchange Administration Services verifies your entry and performs the requested action.

■ On any other panel, when you press Enter, Information Exchange Administration Services verifies your input is acceptable. You remain on the same panel. If you have made an entry that Information Exchange Administration Services recognizes as an error, you see an error message.

Working with entry panels

When you work with entry panels, you must tell Information Exchange Administration Services what item you want to work with and what action you want to take on that item.

Choosing the item you want to work with

On most panels, you see the account ID and the user ID of the account or user that you are working with.

Here is an example.

Your ID is displayed
when you first see
the panel →

```
M2000US                    Work with Alias Tables

   Account ID.............  ACCT1    (all actions, table type O or P)
   User ID................  USER1    (all actions, table type P)
   Table type (G/O/P)......  _        (all actions)
   Table name.............  ___      (actions 2, 3, 4, 5, or 6)
   Authorization (G/A/P)...  _        (action 2)

   Action.................  _    1. List alias tables
                                 2. Add an alias table
                                 3. Browse an alias table
                                 4. Change an alias table
                                 5. Delete an alias table
                                 6. Retrieve an alias table




   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu
```

When you first see the panel, the system displays your own account ID and user ID. If you want to work with another account or user, type that account or user ID over your ID.

You may want to perform more than one task for an account or user. The easiest way to do this is to type the information that identifies what you want to work with (for example, the account ID and user ID) on the first panel that you can. Information Exchange Administration Services carries the information to the subsequent panels. Then, when you return to the first panel, you can perform tasks for the same person or account without having to retype information.

In many cases, you do not *have* to type the information on the first panel. You can type the information on the next panel that is displayed, or you can choose the account, list, or person you want to work with from a list.

With Information Exchange Administration Services, you can choose actions in either of two ways:

■   If you know the name of the item you want to work with, you can fill in an entry field and begin working.

■   If you do not know the exact name of the item, or you want to see all the available items, you can choose the item(s) from a list.

Suppose you want to change a distribution list. If you know the name of the distribution list, you can complete the panels in the following way:

Fill in the name of the
distribution list you want
to work with

Also fill in the "List
type" field

Choose Action 4

```
M4000US                    Work with Distribution Lists

  Account ID........  ACCT1     (actions 1, 2, 3, 4, 5, or 6)
  User ID..........   USER1     (actions 1, 2, 3, 4, 5, or 6 and List Type P)
  List name........   DISTLST1  (actions 2, 3, 4, 5, or 6)
  List type (A/P)...  A         (actions 1, 2, 3, 4, 5, or 6)

  Action...........   4   1. List distribution lists
                          2. Add a distribution list
                          3. Browse a distribution list
                          4. Change a distribution list
                          5. Delete a distribution list
```

The Change a Distribution
List panel displays

```
M2700US                 Change a Distribution List

  Account ID / User ID....  ACCT1     /
  List type / name........  A / DISTLST1

  Locate Alias...................  _ ___ _____  (press Enter)
  Start at Sys, Account, or User ID  ___ _____ _____  (press Enter)

  Codes (multiple selection):
    A = Add     D = Delete

         --------- Partner ---------  or  ----------- Alias -----------
  Code   Sys   Account ID  User ID       Type  Table   Name
  _            ACCT1       USER2
  _            ACCT1       USER3
  _            ACCT1       USER4
  _            ACCT1       USER6
  _      ___   _____     _____        _    ___     _____
```

If you do not know the name of the distribution list, you can fill in the panels in the following way:

Leave the "List name" field blank but fill in the "List type" field

Choose Action 1

```
M4000US                    Work with Distribution Lists

   Account ID........  ACCT1      (actions 1, 2, 3, 4, 5, or 6)
   User ID...........  USER1      (actions 1, 2, 3, 4, 5, or 6 and List Type P)
   List name.........  _____   (actions 2, 3, 4, 5, or 6)
   List type (A/P)...  A          (actions 1, 2, 3, 4, 5, or 6)

   Action...........  1    1. List distribution lists
                            2. Add a distribution list
                            3. Browse a distribution list
                            4. Change a distribution list
                            5. Delete a distribution list
```

The List Distribution Lists panel displays

Find the list you want to work with and fill in C next to it

```
M4100US                    List Distribution Lists

   Account ID..............  ACCT1
   User ID.................            (blank for account lists)
   List Type...............  A

   Start at list name......  _____  (press Enter)

   Codes (multiple selection):
     B = Browse     C = Change     D = Delete     R = Retrieve

   C DISTLST1    _ DISTLST2    _ DISTLST3    _ DISTLST4    _ DISTLST5
   _ DISTLST6    _ DISTLST7    _ DISTLST8    _ DISTLST9
```

You can find the distribution list you want and choose the action you want to take in one step.

You move to the Change a Distribution List panel for the distribution list you chose

This note tells you that you can add or delete more than one entry at a time

Fill in the codes here

```
M2700US                    Change a Distribution List

   Account ID / User ID....  ACCT1     /
   List type / name........  A / DISTLST1

   Locate Alias....................  _ ___ _____       (press Enter)
   Start at Sys, Account, or User ID  ___ _____ _____        (press Enter)

   Codes (multiple selection):
     A = Add      D = Delete

           --------- Partner ---------  or  ------------ Alias -----------
   Code   Sys   Account ID   User ID        Type   Table   Name
     _           ACCT1       USER2
     _           ACCT1       USER3
     _           ACCT1       USER4
     _     SY2   ACCT2       USER6
     _           ACCT1       USER6
```

Making multiple selections on a panel

On many panels, you can choose both the item you want to work with and the action you want to take in just one step.

To do this, type a code that represents the action you want to take next to the appropriate item in a list of items.

Here is an example.

This information tells you that you can choose more than one item at a time

This information tells you what actions you can take and the code that represents the action

Fill in the codes here

```
M1331US              List Trading Partners

Account ID / user ID. ACCT1    / USER2

Start at Sys, Account, and User ID   ___ _____ _____     (press Enter)

Codes (multiple selection):
  B = Browse    C = Change    D = Delete    O = Copy

        --- Partner User ----    ---- Partner Alias ----- ---- Pay charges? ----
 Code  Sys Account  User ID    Typ Tbl Name            Send   Receive CCP   CCR
                                                       S R B  S R B  P R   P R
   B       ACCT1    USER1       G   TB5 ALIAS5          Y N N  N N N  Y N   N Y
   C       ACCT1    USER5       G   TB6 ALIAS6          Y N N  N N N  Y N   N Y
   D       ACCT1    USER3       O   TB7 ALIAS7          Y Y N  N Y N  Y N   N Y
   O       ACCT1    USER6                               Y Y N  Y Y N  Y N   N Y



 Command ===>
 Enter  F1=Help  F2=Add Partner  F3=Exit  F4=Main Menu  F12=Cancel
```

In this example, you see that you can choose more than one item at a time, because the words "multiple selection" display on the panel above the list of codes.

Information Exchange Administration Services processes selections (other than deletes) in the order they appear on the list. Deletes are processed last and when you press F3.

Controlling where a list starts

If you are working with very long lists, you may want to control which part of the list you work with at any one time. Information Exchange Administration Services gives you the "Start at" field. You may also see the "Locate" field.

Both the "Start at" field and the "Locate" field let you narrow down the list by starting with a particular item.

■ Use the "Start at" field if the list contains only one item with the value you type.

■ Use the "Locate" field if the list contains more than one item with the value you type. You move to each subsequent item by pressing Enter.

Here is an example. To use the "Start at" field, on the Browse an Alias Table panel:

You could use the "Start at" field to move immediately to an alias that is much farther down the list

```
M2900US                   Browse an Alias Table

Table type / Table name.......  O / TB1

Start at alias...............  _____      (press Enter)

Locate sys, account, or user ID ___ _____ _____  (press Enter)

Alias name          Sys    Account   User ID    Typ Tbl    Name
ALIAS1                     ACCT1     USER5
ALIAS2                     ACCT1     USER6
ALIAS3                     ACCT1     USER7
ALIAS4                                           O   TB7   ALIAS7
ALIAS5                                           O   TB8   ALIAS8




 Command ===>
 Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward  F12=Cancel
```

1. Type the alias you want to start with.
   You can also type a letter, such as **c**, to start the list with the first alias beginning with that letter, or with the next alias in the list after that letter.

2. Press Enter.
   The list is redisplayed with the alias you specified at the beginning of the list. If the alias you specified does not exist, the list starts with the next alias in the list. If the alias is beyond the end of the list, you get an error message.

To use the "Locate" field:

1. Type in the account ID and user ID you want to start with.
   The account ID and user ID must be an exact match.

2. Press Enter.
   Continue pressing Enter to see each subsequent occurrence of the "Locate" match.

Retrieving information into your mailbox

You can use Information Exchange to retrieve various types of items into a mailbox, including a distribution list or an alias table. You may want to do this if you (or someone in your account) prefer to make changes to the list or table in an environment other than Information Exchange Administration Services. For example, you may want to use your favorite text editor.

Here is an example of how you do this.

Fill in the name and type of the distribution list you want to retrieve, for example →

Choose Action 6 →

```
M4000US                    Work with Distribution Lists

   Account ID........  ACCT1    (actions 1, 2, 3, 4, 5, or 6)
   User ID...........  USER1    (actions 1, 2, 3, 4, 5, or 6 and List Type P)
   List name.........  DISTLST1 (actions 2, 3, 4, 5, or 6)
   List type (A/P)...  P        (actions 1, 2, 3, 4, 5, or 6)

   Action............  6   1. List distribution lists
                           2. Add a distribution list
                           3. Browse a distribution list
                           4. Change a distribution list
                           5. Delete a distribution list
                           6. Retrieve a distribution list
                           7. Work with groups
```

Next, fill in the information on the Retrieve a Distribution List panel

```
M4800US                 Retrieve a Distribution List

   Account ID / User ID...............  ACCT1    / USER1
   Owning account ID / User ID........  ACCT1    / USER1
   List type / List name..............  P / DISTLST1

   Receiver's information (fill in only one line)
     Account ID - User ID.............  _____ - _____
     Alias type - table - name........  _ - ___ - _____
   Message name.......................  _____
   Message sequence...................  _____
   Delivery class (P/blank)...........  _
   Retention period (Max 030 )........  __
   Output format type (B/S)...........  B




   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

After you press F3 or F4 to leave the panel, the distribution list is sent to your mailbox as an inbound message from *SYSTEM* ADMINGET.

You can then use an Information Exchange interface program, such as an Expedite, to receive the message into your environment. After you have made the changes, you can use the Information Exchange interface program to send the updated list back to Information Exchange.

Confirming deletions

When you delete information, Information Exchange Administration Services often asks you to confirm that you want to delete.

Here is an example of a panel where you can confirm or cancel the deletion request.

To confirm the deletion, fill in Y and press Enter

```
M2400US                    Delete a Distribution List

  Account ID..............  ACCT1
  User ID.................  USER1    (blank for account lists)
  List name...............  DISTLST1
  List type...............  P

Do you want to delete this list? (Y/N)...  Y




Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

To cancel the deletion, choose one of the following:

- Type **n** and press Enter or F3
- Press F12
- Press F4 if you type something other than **y**
- Press F4 and leave the field blank

If you choose to delete multiple items:

- You see a confirmation panel for each item you marked for deletion, unless you cancel the remaining deletions.

- You can cancel all deletions by filling in **n** and pressing F4.

- You can delete this item only and cancel all the remaining deletions by filling in **y** and pressing F4.

Saving your work

Information Exchange Administration Services checks the information you enter and saves your changes whenever you press F3 or F4.

When you press F7, F8, or Enter, Information Exchange Administration Services checks the information you enter and verifies your changes are correct. The changes are permanently saved when you press F3 or F4.

Getting help

If you need more information about the actions on a particular panel, or if you are not sure what to do next, you can get help.

To get the help panel, you can do any of the following:

- Press **F1** or **PF1**
- Type **F1** on the command line and press Enter
- Type **PF1** on the command line and press Enter

The system displays the help for the panel you are on.

Here is an example.

```
M4000US              Work with Distribution Lists

   Account ID........ ACCT1     (actions 1, 2, 3, 4, 5, or 6)
   User ID........... USER1     (actions 1, 2, 3, 4, 5, or 6 and List Type P)
   List name......... DISTLST1 (actions 2, 3, 4, 5, or 6)
   List type (A/P)... P         (actions 1, 2, 3, 4, 5, or 6)

   Action........... _   1. List distribution lists
                          2. Add a distribution list
                          3. Browse a distribution list
                          4. Change a distribution list
                          5. Delete a distribution list
                          6. Retrieve a distribution list
                          7. Work with groups
                          8. Work with trading partners
                          9. Copy a distribution list to a trading partner list



   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

To get help on the Work with Distribution Lists panel, press F1

```
M4000US                   Help for            (Panel 01 of 04)
                     Work with Distribution Lists

   Distribution lists can make it easier for users to communicate by
   letting them send the same mail item to multiple users at once. For
   example, if a user regularly sends the same invoice information to
   twenty different business office users, the user can send the invoice
   to all twenty at once by including them in a distribution list.

   A distribution list is not the same as a list of trading partners.
   Trading partners are a way of restricting with whom and how users
   exchange mail. For distribution lists to work, the users on the list
   must be able to communicate with the user sending the mail item
   Distribution lists do not define how and with whom users can communicate.
```

To return to the Work with Distribution Lists panel, press F3

Handling the format selection for viewing

Sometimes, when you view text, you get a panel that asks you if you want to see the text wrapped or one record per line.

If the following conditions are true, you will have to specify the format for the text.

- The record format is a fixed length.
- The record length is not equal to 79 or zero.
- The data format is "NOT EDI".
- The message has a common data header or is a library member.

The Format Selection for Viewing panel looks like this.

This message tells you the actual length of each record

Fill in your choice for how you want to view the information here

You see this message only if the record length is over 2340

```
M9999US                    Format Selection for Viewing

    Account ID.............   ACCT1
    User ID................   USER1

    The data you are viewing has a record length of 00124 and the panel
    displays 79 characters per line.

    If the data is viewed as is, wrapping will occur.

    Action................   _   W = view in Wrapped format
                                 O = view One record per line


    Warning - The record length is greater than 2340.
    Only the first 2340 characters will be displayed.



    Command ===>
    Enter F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

If you type:

- **w** and the record length is less than 79, Information Exchange Administration Services displays successive lines appended to the end of the first record, displaying 79 characters per line.

- **w** and the record length is greater than 79, starting with the 80th character, the text wraps onto the following lines.

- **o** and the record length is less than 79, Information Exchange Administration Services displays one record per line. There are blank characters added to the end of the line. Each successive record is on its own line.

- **o** and the record length is greater than 79, Information Exchange Administration Services displays the first 79 characters. Press F11 and F10 to move right and left.

NOTE: If the record length is greater than 2340, the record is truncated to 2340.

Using the View Message Text panel, here is an example of what the text looks like if you choose to view the text in wrapped format.

You see each line in wrapped format

```
M3102US                    View Message Text        Page     000001 of 000001
                                                     Columns  00001 -    00079

Message text sent to
    Account ID / User ID        ATAP    / USER4       This is a BILLABLE function

1-This example shows what will happen when the record length of a file is great
er than 79 characters. 2-A format selection panel will be displayed. You can
then decide if you wish to see the data WRAPPED or ONE RECORD PER LINE. 3-The
numbers to the left illustrate the record number when viewing ONE RECORD PER
LINE. 4-When the numbers line up on the left, the data was displayed ONE RECORD
PER LINE. 5-If the numbers do not line up, the data was displayed WRAPPED.






Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

Here is an example of what the text looks like if you choose to view it one record per line.

You see the first 79
characters of each line

```
M3102US                    View Message Text       Page    000001 of 000002
                                                    Columns  00001 -00079
 Message text sent to
   Account ID / User ID.... ACCT1    / USER4       This is a BILLABLE function



 1-This example shows what will happen when the record length of a file is great
 2-A format selection panel will be displayed.  You can then decide if you wish
 3-The number to the left illustrates the record number when viewing ONE RECORD
 4-When the numbers line up on the left, the data was displayed ONE RECORD PER LI
 5-If the numbers do not line up, the data was displayed WRAPPED.




 Command ===>
 Enter  F1=Help  F3=Exit  F4=Main Menu  F11=Right  F12=Cancel
```

Press F11 to move right to
see the rest of the
characters

If you pressed F11 to move right, the next panel looks like this.

Here is the rest of each line

```
M3102US                    View Message Text       Page    000001 of 000002
                                                    Columns  00080 -00104
 Message text sent to
   Account ID / User ID.... ACCT1    / USER4       This is a BILLABLE function
 er than 79 characters.
  to see the data WRAPPED or ONE RECORD PER LINE
 PER LINE.
 NE.




 Command ===>
 Enter F1=Help  F3=Exit  F4=Main Menu  F10=Left  F12=Cancel
```

Press F10 to move back to
the first panel

Understanding the cluster mailbox

Using the *cluster mailbox* feature of Information Exchange, you can define a set of mailboxes that appears as one mailbox to your trading partners. A cluster mailbox user has the ability to handle several sessions simultaneously. You can define additional mailboxes to send and receive data through Information Exchange without requiring your trading partners to change address information. This can be beneficial if you exchange a large amount of data with many trading partners, while operating within a restricted window for completion of message transport.

This chapter covers the following:

Understanding cluster user terminology and naming convention

A *cluster user* is a user known to trading partners by a generic name referred to as the *cluster parent user ID* (parent user ID). A parent user ID can have 2 to 99 mailboxes associated with it. The individual mailboxes are referred to as *cluster child user IDs* (child user IDs). The parent user ID is limited to six characters. Child user IDs use the parent's 6-character name plus a 2-character suffix, assigned sequentially.

Figure 1 shows an example of the relationship of parent and child user IDs. ACCT1.USER1 is the parent user ID; ACCT1.USER101 and ACCT1.USER102 are the child user IDs.

CLUSTER PARENT USER ID

ACCT1.USER1

IDCLUSTER CHILD USER

ACCT1.USER101

IDCLUSTER CHILD USER

ACCT1.USER102
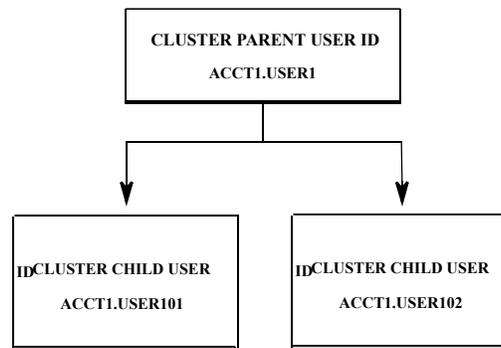
Figure 1.   Illustration of naming convention

Cluster user registration

Cluster mailbox users are defined as a result of a registration order for a customer.

The following options are available:

■   Convert an existing user to a cluster user.
■   Convert a cluster user to a noncluster user.
■   Add a user as a cluster user.
■   Change the number of mailboxes in a cluster.

Cluster users are defined only as general users to Information Exchange and do not have access to Information Exchange Administration Services. Cluster users cannot be alternate account or alternate user administrators. A noncluster user must be authorized to perform service administrator duties for cluster users.

Changing the number of cluster mailboxes

A registration order to change the number of cluster mailboxes is processed if there are no active or incomplete sessions for any of the child user IDs. If the number of child user IDs decreases, acknowledgments for a particular child user ID, which is no longer available, are placed in the first child user ID mailbox. If a message is sent to an Information Exchange system that does not support the cluster mailbox function, the acknowledgment is returned and placed in the first child user ID mailbox.

Special considerations for cluster users

When using cluster user IDs, use a child user ID to start an Information Exchange session. Parent user IDs are not allowed to establish an Information Exchange session and are treated as invalid user IDs.

When you send messages to Information Exchange, you can distribute the messages you send among the available child user ID mailboxes. This results in faster message completion and transport to Information Exchange. When you send a message and request an acknowledgment, the acknowledgment is placed in the mailbox of the child user ID issuing the send request. If you use multiple child user IDs to send messages to a single trading partner, the messages arrive at the trading partner's mailbox in an indefinite sequence, even if the "Deliver messages in sequence" option field is Y in the profile. If you need sequential message delivery, send messages to the same trading partner from the same child user ID.

When you receive messages, it is important that you issue the receive request for each available child user ID, because messages destined to a parent user ID are placed in a child user ID mailbox based on a hash of the sender's user ID. All messages from a single trading partner go to a single child user ID mailbox. Issuing the receive request for each child user ID ensures that all the mail items available to the cluster user are delivered. As a cluster owner, you should not assume that mail is placed into a specific child user ID mailbox by Information Exchange, because the method used to determine message placement may change.

Archived messages

Archived messages are owned by the parent user ID. When you request to retrieve an archived message, you must specify the child user ID mailbox you want the archived message placed in. If you request a retrieve of the same archived group to multiple child user ID mailboxes, the archived group is retrieved into all the requested mailboxes and may result in duplicate message processing by the cluster owner.

Audit trails

You can view or retrieve audits in either of the following ways:

■ You can request audits for all child user IDs by specifying the parent user ID on the panel, or

■ You can specify a child user ID and have only the records for that child user ID returned.

Session traces

You can view or retrieve session traces in either of the following ways:

■ You can request the traces for all child user IDs by specifying the parent user ID on the panel, or

■ You can specify a child user ID and have only the records for that child user ID returned.

Looking at cluster parent and cluster child objects

Information Exchange associates several objects with cluster user IDs. It is important to understand which type of user ID, parent or child, is associated with each of these objects. This table lists the object and the cluster user ID type associated with it.

Object name:	User ID type:
User profile	Cluster parent
User groups	Cluster parent
Alias tables	Cluster parent
Private distribution lists	Cluster parent
User mailbox	Cluster child
Archived messages	Cluster parent
Message audits	Cluster parent
Session traces	Cluster child
Trading partner list	Cluster parent
Private libraries	Cluster parent
IE user's X.400 user profile	Cluster parent
X.400 trading partner attributes	Cluster parent
Event profile	Cluster parent or cluster child
Message-arrival definitions	Cluster parent
Scheduled-event definitions	Cluster parent
Event trails	Cluster child
User passwords	Cluster child
User sessions	Cluster child
Carbon copy relationships	Cluster parent
IE user's Internet user profile	Cluster parent
Internet trading partner attributes	Cluster parent

Understanding payment level resolution

This chapter provides an overview to help you understand Information Exchange payment level resolution for:

- Sending and receiving regular messages
- Processing and receiving carbon copy messages

Payment levels are defined in:

- The trading partner list
- The user profile
- The account profile

To understand payment levels associated with trading partners, see "Looking at trading partner information" on page 79.

To understand payment levels associated with user profiles, see "Looking at the information in a user profile" on page 64.

To understand payment levels associated with account profiles, see "Looking at the information in an account profile" on page 46.

For more information about payment levels and message charges, see the *Information Exchange Charges Reference*.

This chapter covers the following:

Understanding sending and receiving payment levels

Every time trading partners exchange messages with each other, Information Exchange assigns two charges:

- A send-side charge for sending the message
- A receive-side charge for receiving the message

If both trading partners are on the same Information Exchange system, these charges may be:

- Paid by the sender
- Paid by the receiver
- Split between the sender and the receiver

When a sender sends a message to a trading partner connected to a messaging service other than the sender's local Information Exchange system, restrictions on payment options may apply. For more information, see the *Information Exchange Charges Reference.*

Information Exchange uses two kinds of information to resolve charges for each message:

- A message charge code (1 - 6) used by several Information Exchange Administration Services functions to specify the requested payment resolution.

- Payment-level information in users' trading partner lists or user profiles that specifies their willingness to pay.

When both the sender and the receiver are on the same Information Exchange system, payment-level information from both is used to resolve charges.

When the sender and the receiver are not on the same Information Exchange system, restrictions on payment options may apply.

When you send Internet messages, only send-side message charges are incurred; you must agree to pay these charges. Similarly, when you receive Internet messages, only receive-side message charges are incurred; you must agree to pay these charges. There are no message charges for messages received from account ID *SYSTEM* and user ID *SMTPGW*.

When you send X.400 messages from Information Exchange, as the sender, you pay all the charges for an outgoing message; you must agree to pay these charges. However, you do not pay any charges for the following:

- Incoming X.400 messages
- Receiving and viewing messages from account ID *SYSTEM* and user ID **X400**

How does Information Exchange use payment level information?

Payment levels for message charges are defined in:

- The trading partner list
- The user profile

When you set up a user, you must specify the user's willingness to pay charges for sending and receiving regular messages.

Here are some things to note:

- Payment levels must be set for both sending and receiving regular messages.

- Payment levels set in the trading partner list override the general payment levels specified in the user profile.

- If the sender has blocked communication with the receiver or the receiver has blocked communication with the sender, the message is not delivered.

When you try to send a message to a trading partner who is outside of your account and on your local system, Information Exchange checks:

- Trading partner lists
- User profiles

If the receiver is in your trading partner list, Information Exchange uses the information in the list to assign the charges. If not, Information Exchange uses the information in your profile to assign the charges.

Similarly, Information Exchange uses the receiver's trading partner list, and if you are not in that list, the receiver's user profile.

When you try to send a message to a trading partner within your account, Information Exchange checks the sender's and receiver's trading partner list. If the trading partner is in the list, Information Exchange uses the payment-level information in the list to assign the charges. If not, Information Exchange asks these questions in this order:

1. Is unrestricted communication permitted between user IDs within your account?

2. Are you and the receiver in user groups that intersect?

3. Is communication permitted based on the user profile?

If the answer to a question is **No**, Information Exchange goes to the next question. As soon as the answer to one of the questions is **Yes**, Information Exchange delivers the message.

If the answer to all questions is **No**, the message is not delivered.

When you try to send a message to a trading partner who is outside of your local system, the remote system may check the partner's willingness to pay the requested charges for the message.

When you try to send a message to a trading partner who is on the Internet, the "Allow users in the account to exchange Internet messages?" field in the account profile must be set to **y**.

When you try to send a message to an X.400 trading partner, your account must have an X.400 Country Code assigned.

Restrictions on assignment of charges may apply depending on the billing rules between Information Exchange and the specific remote system.

What happens if payment combinations or destinations are invalid?

If a sender sends a message using an invalid payment combination or sends to an invalid destination and the message is not delivered, Information Exchange generates an error message. The sender incurs send-side charges. To avoid incurring unnecessary send-side charges for invalid payment combinations or destinations, validate the payment authorization and the destination address before sending a message to a new or unfamiliar trading partner.

Understanding carbon copy payment levels

The carbon copy feature enables the delivery of an electronic copy, or carbon copy, of a message to one or more recipients. Sending and receiving carbon copy messages result in additional charges that derive from:

- Processing (generating) the carbon copy
- Receiving the carbon copy

The carbon copy *requester* specifies a user to pay each of the carbon copy charges. A requester of a carbon copy defines a carbon copy relationship based on the exchange of mail with another user known as the carbon copy *partner*. If the carbon copy takes place because the carbon copy requester sends mail, the partner is the original intended receiver. If the carbon copy takes place because the carbon copy requester receives mail, the partner is the sender. The carbon copy requester specifies a user to be copied; this user is the carbon copy *recipient*.

If both trading partners are on the same Information Exchange system, each charge may be paid by one of the following:

- The carbon copy requester
- The carbon copy partner
- The carbon copy recipient

If either the partner or recipient in a carbon copy relationship is connected to a message service other than the user's local Information Exchange system, restrictions on payment options apply.

Information Exchange uses two kinds of information to resolve charges for each carbon copy message:

- Information about the user who is designated to pay the carbon copy charges as specified by the carbon copy requester in the relationship. For more information, see "How to control assignment of carbon copy charges" on page 144.

- Information about the payment-level as specified in users' trading partner lists or user profiles, which specify their willingness to pay carbon copy charges.

How is carbon copy payment authorization validated?

There are multiple conditions that determine if carbon copy is authorized.

1. Carbon copy authorization will fail if either of the following is true:

    a. The recipient specifies Y for receive-side "Block communication?" for the carbon copy requester.

    b. The requester specifies Y for the send-side "Block communication?" for the carbon copy recipient.

2. When the carbon copy requester is specified to pay carbon copy charges, the carbon copy is authorized by default. No additional authorization information is required.

3. When you try to send a carbon copy message to a trading partner who is outside of your account and on your local system, Information Exchange checks:

    - Trading partner lists
    - User profiles

If the requester is in the trading partner list of the user specified to pay (partner or recipient), Information Exchange uses the information in the list to validate the charges. If not, Information Exchange uses the information in the user profile to validate the charges.

4. When you try to send a carbon copy of a message to a trading partner within your account, Information Exchange checks the trading partner list. If the requester is in the trading partner list of the user specified to pay (partner or recipient), Information Exchange uses the information in the list to validate the charges. If not, Information Exchange asks these questions in this order:

    a. Is communication unrestricted between users in the account of the user specified to pay (Partner or Recipient)?

    b. Is communication permitted based on the information in the user profile of the user specified to pay (Partner or Recipient)?

    If the answer to a question is **No**, Information Exchange goes to the next question. As soon as the answer to one of the questions is **Yes**, Information Exchange delivers the message. If the answer to all the questions is **No**, the message is not delivered.

5. When you try to send a carbon copy of a message to a trading partner who is outside of your local system, restrictions on assignment of charges may apply, depending on the billing rules between Information Exchange and the specific remote system.

What happens if payment is not authorized or destinations are not valid?

The carbon copy processing charge is applied at the time the carbon copy message is created. This charge is incurred regardless of whether the carbon copy message is delivered to the recipient. That is, if the carbon copy message is rejected for any reason, the processing charge is billed to the carbon copy requester.

In general, the following rules apply when:

■ The carbon copy destination is not valid

  • If the carbon copy or redirect recipient destination is not valid, the carbon copy requester is billed the carbon copy processing charge and the carbon copy is not delivered.

■ The carbon copy message payment is not authorized

  • If only the processing charge cannot be resolved, the requester is billed the carbon copy processing charge, and the carbon copy message is delivered to the recipient's mailbox.

  • If only the receive-side charge cannot be resolved, the requester is billed the processing charge, and the carbon copy message is not delivered to the recipient's mailbox.

  • If both the processing charge and the receive-side charge cannot be resolved, the requester is billed the processing charge, and the carbon copy message is not delivered to the recipient's mailbox.

- The redirect message payment is not authorized (the "Purge Original Message?" field is specified as Y) in a send or receive carbon copy relationship

    - If only the processing charge cannot be resolved, the requester is billed the processing charge, and the redirected message is delivered to the recipient's mailbox.

    - If the message is to a local user and only the receive-side charge cannot be resolved, the requester is billed the receive-side charge and the redirected message is delivered to the recipient's mailbox. The processing charge is billed to the user specified to pay.

    - If the message is to a remote (intersystem) user and only the receive-side charge cannot be resolved, the requester is billed the processing charge, and the redirected message is not delivered to the recipient's mailbox.

    - If the message is to a local user and both the processing and the receive-side charge cannot be resolved, the requester is billed both charges, and the redirected message is delivered to the recipient's mailbox.

    - If the message is to a remote user and both the processing and the receive-side charge cannot be resolved, the requester is billed the processing charge and the redirected message is not delivered to the recipient's mailbox.

Specifying payment levels

When you set up a user, you must specify the user's willingness to pay charges for sending and receiving regular messages, as well as for processing and receiving carbon copy messages.

Here are some things to note:

■ Payment levels must be set for both sending and receiving regular messages.

■ Payment levels must be set for both processing and receiving carbon copy messages.

■ Payment levels set in the trading partner list override the general payment levels specified in the user profile or in the profile type.

Specifying payment levels for the sender

Send-side payment levels define whether the user is willing (**y**) or is not willing (**n**) to pay when sending messages.

> NOTE: When sending, you cannot specify to pay the receive-side charge if you do not specify to pay the send-side charge.

■ **As sender (Y/N):**
  • Pay for sending?
    This specifies the user's willingness to pay the send-side charge when sending a message.

  • Pay for receiving?
    This specifies the user's willingness to pay the receive-side charge when sending a message.

  • Block communication?
    This specifies that the user wants to block sending messages.

The following combinations are valid for Sending (**S**), Receiving (**R**), and Blocking (**B**) communications:

S	R	B	The sender:
Y	N	N	Is willing to pay only the send-side charge.
Y	Y	N	Is willing to pay both the send and receive-side charge.
N	N	N	Is not willing to pay any charges.
N	N	Y	Has communications blocked for sending messages.

> NOTE: A user can exchange mail with anyone who is using Information Exchange. Many users want to restrict the number of users with whom they exchange mail. You can do this for your users by setting the "Block communication?" fields in the profile type to **y** and creating a list of trading partners for the user. For more information, see Chapter 7, "Working with trading partners."

Specifying payment levels for the receiver

Receive-side payment levels define whether the user is willing (**y**) or is not willing (**n**) to pay when receiving messages.

> NOTE: When receiving, you cannot specify to pay the send-side charge if you do not specify to pay the receive-side charge.

- **As receiver (Y/N):**
  - Pay for sending?
    This specifies the user's willingness to pay the send-side charge when receiving a message.

  - Pay for receiving?
    This specifies the user's willingness to pay the receive-side charge when receiving a message.

  - Block communication?
    This specifies that the user wants to block receiving messages.

The following combinations are valid for Sending (**S**), Receiving (**R**), and Blocking (**B**) communications:

S	R	B	The receiver:
N	Y	N	Is willing to pay only the receive-side charge.
Y	Y	N	Is willing to pay both the send-side and receive-side charge.
N	N	N	Is not willing to pay any charges.
N	N	Y	Has communications blocked for receiving messages.

> NOTE: A user can exchange mail with anyone who is using Information Exchange. Many users want to restrict the number of users with whom they exchange mail. You can do this for your users by setting the "Block communication?" fields in the profile type to **y** and creating a list of trading partners for the user. For more information, see Chapter 7, "Working with trading partners."

Specifying payment levels for carbon copy

You can specify a user's willingness to pay charges when the user is a *carbon copy partner.*

- **As carbon copy partner (Y/N):**
  - Pay for processing?
    This specifies the user's willingness to pay the carbon copy processing charge.

  - Pay for receiving?
    This specifies the user's willingness to pay the carbon copy receive-side charge.

The following combinations are valid for the carbon copy Processing (**P**) charge and the carbon copy Receive (**R**) charge for a carbon copy partner.

P	R	The carbon copy partner (CCP):
Y	Y	The user is willing to pay both the carbon copy processing charge and the carbon copy receive-side charge when the user is a carbon copy partner.
Y	N	The user is willing to pay only the carbon copy processing charge when the user is a carbon copy partner.
N	Y	The user is willing to pay only the carbon copy receive-side charge when the user is a carbon copy partner.
N	N	The user is not willing to pay either charge when the user is a carbon copy partner.

You can specify a user's willingness to pay charges when the user is a *carbon copy recipient*.

- **As carbon copy recipient (Y/N):**
  - Pay for processing?
    This specifies the user's willingness to pay the carbon copy processing charge.

  - Pay for receiving?
    This specifies the user's willingness to pay the carbon copy receive-side charge.

The following combinations are valid for the carbon copy Processing (**P**) charge and the carbon copy Receive (**R**) charge for a carbon copy recipient.

P	R	The carbon copy recipient (CCR):
Y	Y	The user is willing to pay both the carbon copy processing charge and the carbon copy receive-side charge when the user is a carbon copy recipient.
Y	N	The user is willing to pay only the carbon copy processing charge when the user is a carbon copy recipient.
N	Y	The user is willing to pay only the carbon copy receive-side charge when the user is a carbon copy recipient.
N	N	The user is not willing to pay either charge when the user is a carbon copy recipient.

Working with account profiles

An *account* is a set of users who work in a related area of a company. As the Information Exchange Service Administrator, you may work with one or many accounts. You do not actually create the accounts for your company; GXS creates the accounts.

This chapter covers the following:

Understanding account profiles

Each account has an account profile that defines the characteristics of the account. An account profile specifies:

■ Which users can act as alternate service administrators for the account

■ How users within the account communicate with one another

   You can have users within the account communicate freely, or you can set up user groups and trading partner lists to control communications.

■ Profile types for the account

   With profile types, you can define common characteristics for a set of users at the account level.

GXS sets up an initial account profile when your account is established. As the service administrator, you can change this initial account profile to suit the users you work with.

Looking at the information in an account profile

Here is the information in an account profile.

■ **Allow unrestricted communication within account**
The way you set this field determines whether or not all users in the account can exchange mail without restriction.

   If you want all users in the account to communicate with one another, regardless of how any individual profiles are set up, set this field to **y**.

   If "Allow unrestricted communication within account" is set to **y**, the payment levels in the users' profile and user groups are ignored, and the account is charged for messages sent and received between users in the account.

   If you want the users in this account to exchange messages with one another only according to what is set up in their user profiles, trading partner lists, and user groups, make sure the field is set to **n**.

   You set the "Allow unrestricted communication within account" field at the account level. You cannot have different settings for different profile types.

■ **Allow users in the account to exchange Internet messages**
The way you set this field determines whether or not all users in the account can access the Internet Services panels and send messages to and receive messages from users on the Internet.

   If you want all users in the account to be able to access the Internet Services panels and send messages to and receive messages from any users on the Internet, set this field to **y**. Users in the account will be able to exchange messages with Internet users only if their user profiles and trading partner lists also allow messages to be exchanged with the Internet users.

If you do not want any users in this account to be able to access the Internet Services panels and send messages to and receive messages from any users on the Internet, set this field to **n**. If you set this field to **n**, none of the users in the account can access any of the available Internet Services panels within Information Exchange Administration Services. The default is **n**.

You set the "Allow users in the account to exchange Internet messages" field at the account level. You cannot have different settings for different profile types.

■ **Account alternate administrators**
You can delegate some of your tasks to up to four other users. These alternate administrators are in addition to any registered level-4 users (Information Exchange Service Administrators) in the account. These users do not have to be in the same account.

To have all level-4 users in another account act as alternate administrators for your account, on the Change an Account Profile panel, under the heading "Account alternate administrators", type their account ID and an authority code.

To have a specific user in another account act as an alternate administrator for your account, on the Change an Account Profile panel, type their account ID, user ID, and an authority code.

The following table lists the authority codes and their descriptions.

This type:	Can do this:
A	All service administrator functions
M	Only view mail for all users in the account
N	All service administrator functions except viewing and deleting mail
S	All service administrator functions except viewing and deleting mail, but can view messages from account ID *SYSTEM*

NOTE: To let all service administrators in another account act as account alternate administrators for your account, type their account ID and leave the user ID blank.

■ **Profile type (optional)**
This is an entry field that takes you to another panel to look at the information in a profile type; it is based on the profile number you select.

■ **Date created - date modified**
This field shows you when the account profile was created and when the account profile or any of its profile types were last changed.

■ **Last user to modify**
This field shows you which user made the latest change to the account profile or any of its profile types.

Looking at the information in a profile type

Here is the information contained in a profile type.

■ **As sender (Y/N):**
These payment levels define whether users with this profile type are willing (**y**) or are not willing (**n**) to pay when sending messages.

• Pay for sending?
This specifies the user's willingness to pay the send-side charge when sending a message.

• Pay for receiving?
This specifies the user's willingness to pay the receive-side charge when sending a message.

• Block communication?
This specifies that users are blocked from sending any messages at all.

The following combinations are valid for Sending (**S**), Receiving (**R**), and Blocking (**B**) communications:

S	R	B	The sender:
Y	N	N	Is willing to pay only the send-side charge.
Y	Y	N	Is willing to pay both the send-side and receive-side charge.
N	N	N	Is not willing to pay any charges.
N	N	Y	Has communications blocked for sending messages.

NOTE: A user can exchange mail with anyone who is using Information Exchange. Many users want to restrict the number of users with whom they exchange mail. You can do this for your users by setting the "Block communication?" fields in the profile type to **y** and creating a list of trading partners for the user. For more information, see Chapter 7, "Working with trading partners."

■ **As receiver (Y/N):**
These payment levels define whether users with this profile type will (**y**) or will not (n) pay when receiving messages.

• Pay for sending?
This specifies the user's willingness to pay the send-side charge when receiving a message.

• Pay for receiving?
This specifies the user's willingness to pay the receive-side charge when receiving a message.

• Block communication?
This specifies that users are blocked from receiving any messages at all.

The following combinations are valid for Sending (**S**), Receiving (**R**), and Blocking (**B**) communications:

S	R	B	The receiver:
N	Y	N	Is willing to pay only the receive-side charge.
Y	Y	N	Is willing to pay both the send-side and receive-side charge.
N	N	N	Is not willing to pay any charges.
N	N	Y	Has communications blocked for receiving messages.

NOTE: A user can exchange mail with anyone who is using Information Exchange. Many users want to restrict the number of users with whom they exchange mail. You can do this for your users by setting the "Block communication?" fields in the profile type to **y** and creating a list of trading partners for the user. For more information, see Chapter 7, "Working with trading partners."

■   **As carbon copy partner**
These payment levels define whether the user with this profile type is willing (**y**) or is not willing (**n**) to pay when the user is a carbon copy partner.

•   Pay for processing?
This specifies the user's willingness to pay the carbon copy processing charge.

•   Pay for receiving?
This specifies the user's willingness to pay the carbon copy receive-side charge.

The following combinations are valid for the carbon copy Processing (**P**) charge and the carbon copy Receive (**R**) charge for a carbon copy partner.

P	R	The carbon copy partner (CCP):
Y	Y	The user is willing to pay both the carbon copy processing charge and the carbon copy receive-side charge when the user is a carbon copy partner.
Y	N	The user is willing to pay only the carbon copy processing charge when the user is a carbon copy partner.
N	Y	The user is willing to pay only the carbon copy receive-side charge when the user is a carbon copy partner.
N	N	The user is not willing to pay either charge when the user is a carbon copy partner.

■ **As carbon copy recipient**
These payment levels define whether the user with this profile type is willing (**y**) or is not willing (**n**) to pay when the user is a carbon copy recipient.

- Pay for processing?
  This specifies the user's willingness to pay the carbon copy processing charge.

- Pay for receiving?
  This specifies the user's willingness to pay the carbon copy receive-side charge.

The following combinations are valid for the carbon copy Processing (**P**) charge and the carbon copy Receive (**R**) charge for a carbon copy recipient.

P	R	The carbon copy recipient (CCR):
Y	Y	The user is willing to pay both the carbon copy processing charge and the carbon copy receive-side charge when the user is a carbon copy recipient.
Y	N	The user is willing to pay only the carbon copy processing charge when the user is a carbon copy recipient.
N	Y	The user is willing to pay only the carbon copy receive-side charge when the user is a carbon copy recipient.
N	N	The user is not willing to pay either charge when the user is a carbon copy recipient.

See the *Information Exchange Charges Reference* for more information.

NOTE: Many users want to restrict the number of users with whom they exchange mail. You can do this for your users by setting the "Block communication" fields in the profile type to **y** and creating a list of trading partners for the user. For more information, see Chapter 7, "Working with trading partners."

■ **Forced archiving? (Y/N)**
The *archive* is a place in the system where mail is stored when it is received. This field specifies whether users with this profile type will have their received mail stored in the archive automatically.

If "Forced archiving" is set to **n**, users must specifically request archiving when receiving mail in order to have mail stored in the archive.

NOTE: Archiving is a billable function, based on the message size and the number of days the message remains in archive.

Charges are incurred when the message is deleted.

■ **Archive days**
This is the maximum number of days a message will be stored in the archive. The number must be equal to or below the maximum displayed on the panel.

NOTE: If you specify n for forced archiving and the number of days is zero, even if the user specifies archiving in the Information Exchange receive command, the request for archiving is ignored.

■ **Number of audit/session/event days**

- Audit days

  The audit trail saves information about messages and the status of messages. The audit trail for a message is created when a message is sent. This number of days is used to determine how long the audit for a message remains after the final status of the message is known.

  For example, if the final status of a message is known in 10 days and the audit trail days specified is 15 days, the audit trail is saved for 25 days.

- Session days

  The session trace saves information about Information Exchange sessions and receives. The session trace is created when a user starts a session, or issues a receive command. The session trace remains for the number of days specified.

- Event days

  The event trail saves information about message arrival, scheduled, and user initiated events. The event trail is created when an event occurs and remains for the number of days specified.

  > **NOTE:** The "event" portion of this field does not display on systems that do not use Event Services.

■ **Change acct dist list/groups? (Y/N)**
Set this field to **y** to let users with this profile type add, change, or delete account-level distribution lists and groups.

■ **Change other users' profiles? (Y/N)**
Set this field to **y** to let users with this profile type change other users' profiles and trading partner lists within their account. If this field is set to **y**, users with this profile type can also change and reset passwords for all users in their account.

■ **Change user's own profile? (Y/N)**
Set this field to **y** to let users with this profile type change their own profile and their trading partner list. If you set this field to **n**, users cannot change their own profile or trading partner list, but they can change or reset their own password.

■ **Change libraries? (Y/N)**
Set this field to **y** to let users with this profile type add, change, or delete libraries and members within their account.

■ **Reset session? (Y/N)**
Set this field to **y** to let users with this profile type reset their own session statistics.

■ **Change alias? (Y/N)**
Set this field to y to let users with this profile type add, change, or delete global or organizational alias tables.

■ **Use purge message command? (Y/N)**
Set this field to y to let users with this profile type use the Purge message command from an Expedite product or any other product that supports the Purge message command.

■ **Perform X.400 updates? (Y/N)**
Set this field to y to let users with this profile type add or copy X.400 user profiles, or add, change, or delete X.400 trading partner attributes.

■ **Extended security user? (Y/N)**
Set this field to **y** to make this user an extended security (ESO) user.

Extended security users have additional password restrictions. For information on ESO security enhancements, see "Setting up stricter security" on page 10.

NOTE: If you change existing non-ESO users to ESO users, the users' passwords are revoked, and you must reset or change them for the users to be able to log on.

■ **Immediate delivery recipient? (Y/N)**
This lets users receive express priority messages.

An express priority message is placed ahead of other messages in a user's mailbox. It must be received immediately. The message will be discarded if the user to whom the message is sent does not have a session with Information Exchange and is not receiving messages.

■ **Deliver messages in sequence? (Y/N)**
Set this field to **n** for maximum availability of Information Exchange and for best performance. Set this field to **y** if a trading partner requires mail posted to the mailbox in the sequence it is sent.

This is usually important only if the trading partner is in the process of receiving. Messages not received always appear in the mailbox in the order sent.

NOTE: This option is available if the sender and the receiver of the message are on the same Information Exchange system.

Here are some things to note:

■ Even if the value of "Change other user's profiles?" or "Change user's own profile?" is **y**, general users and user alternate administrators cannot change the following fields:

- "Authorization level"
- "Change acct dist list/groups?"
- "Change other users' profiles?"
- "Change user's own profile?"
- "Change libraries?"
- "Change alias?"
- "Use purge message command?"
- "Perform X.400 updates?"
- "Profile type"
- "Deliver messages in sequence?"

Using profile types

You can think of a profile type as a way to differentiate users' communications characteristics at the account level. In contrast to an account profile, which defines characteristics for all the users in an account, a profile type defines characteristics (such as who pays to send and receive messages, or whether the messages the users receive are archived) for a set of users within an account.

A profile type also defines the functions that users can perform with Information Exchange Administration Services—such as the ability to change values in their own profiles, or the ability to create global or organizational alias tables. When you assign a profile type to a user, the user has all of the characteristics of that profile type.

Within each account, the network sets up 21 initial profile types. You identify a profile type by its number (00–20). The default values for profile types 1–20 are shown in the following two tables.

NOTE: If you change any of the profile types from 1–20, the user profile of each user using the specified profile type is modified with the changes made to that profile type. For example, if changes are made to profile type 02, all users with a profile type of 02 will have the same changes made to their profiles.

This table shows profiles types 1 - 10.

	1	2	3	4	5	6	7	8	9	10
Sender/pay send	Y	N	Y	N	N	Y	N	Y	Y	Y
Sender/pay receive	Y	N	Y	N	N	N	N	N	Y	N
Sender/block	N	N	N	Y	Y	N	N	N	N	N
Receiver/pay send	N	N	Y	N	N	N	N	N	N	N
Receiver/pay receive	N	N	Y	N	N	Y	N	Y	N	Y
Receiver/block	N	N	N	Y	Y	N	N	N	N	N
CC Partner/pay processing	N	N	N	N	N	N	N	N	N	N
CC Partner/pay receive	N	N	N	N	N	N	N	N	N	N
CC Recipient/pay processing	N	N	N	N	N	N	N	N	N	N
CC Recipient/pay receive	N	N	N	N	N	N	N	N	N	N
Archiving	N	N	N	N	N	N	N	N	N	N
Archive days	0	0	0	0	0	0	0	0	0	0
Audit/session/event days	15	15	15	15	15	15	15	15	45	45
Change acct dist list/groups	N	N	N	N	N	N	N	N	N	N
Change other user's profile	N	N	N	N	N	N	N	N	N	N
Change own profile	N	N	N	N	N	N	N	N	N	N
Change libraries	Y	N	Y	Y	Y	Y	N	N	Y	Y
Reset session	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Change alias	N	N	N	N	N	N	N	N	N	N
Use purge msg command	N	N	N	N	N	N	N	N	N	N
Perform X.400 updates	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
ESO user	N	N	N	Y	N	N	N	N	N	N
Immediate delivery	N	N	N	Y	N	N	N	N	N	N
Deliver msgs in sequence	N	N	N	N	N	N	N	N	N	N

This table shows profiles types 11 - 20.

	11	12	13	14	15	16	17	18	19	20
Sender/pay send	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Sender/pay receive	N	Y	Y	Y	Y	y	Y	Y	Y	Y
Sender/block	N	N	N	N	N	N	N	N	N	N
Receiver/pay send	N	N	N	N	N	N	N	N	N	N
Receiver/pay receive	Y	N	N	N	N	N	N	N	N	N
Receiver/block	N	N	N	N	N	N	N	N	N	N
CC Partner/pay processing	N	N	N	N	N	N	N	N	N	N
CC Partner/pay receive	N	N	N	N	N	N	N	N	N	N
CC Recipient/pay processing	N	N	N	N	N	N	N	N	N	N
CC Recipient/pay receive	N	N	N	N	N	N	N	N	N	N
Archiving	N	N	N	N	N	N	N	N	N	N
Archive days	0	0	0	0	0	0	0	0	0	0
Audit/session/event days	45	15	15	15	15	15	15	15	15	15
Change acct dist list/groups	N	N	N	N	N	N	N	N	N	N
Change other user's profile	N	N	N	N	N	N	N	N	N	N
Change own profile	N	N	N	N	N	N	N	N	N	N
Change libraries	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
Reset session	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Change alias	N	N	N	N	N	N	N	N	N	N
Use purge msg command	N	N	N	N	N	N	N	N	N	N
Perform X.400 updates	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
ESO user	N	N	N	N	N	N	N	N	N	N
Immediate delivery	N	N	N	N	N	N	N	N	N	N
Deliver msgs in sequence	N	N	N	N	N	N	N	N	N	N

You may be able to use these profile types to organize your users with similar characteristics. For example, you could use profile type 02 to create a group of non–ESO users who will not pay to send or receive mail, who retain their audit trail records for 15 days, and who can reset their own sessions.

If none of the profile types fits your particular needs, you can change the defaults. For example, if profile type 04 contains most of the settings you need, but you want to keep the audit trail for 25 days instead of 15, just change the value for "Number of audit/session/event days" in the profile type.

If you change a value in a profile type, the network uses your new version of the profile type when new user IDs are registered for the account. Also, the network automatically updates the profile for all users in the account with that same profile type.

Users with characteristics not defined in a profile type are identified by profile type 00.

Profile type 00 works differently from the other twenty. When you change any of the information in an individual user's profile that comes from a profile type, Information Exchange Administration Services changes the user's profile type to 00. This lets you define an individual profile for a user without affecting the other profile types.

You can use profile type 00 to define characteristics for a category of users. However, the network does not automatically update the profiles for all users currently defined with profile type 00 when a change is made to that profile type.

Browsing an account profile

To browse an account profile, follow this path.

```
M0000US              Information Exchange Administration Services
                                      Main Menu
                                    System ID : SY1

   Action  1     Work with one of the following:
                      1. Profiles
                      2. Alias tables
                      3. Distribution lists
                      4. Messages
```

Choose Action 1

```
M1000US                          Work with Profiles

      Account ID.............  ACCT1    (actions 5 - 8)
      User ID................  USER1    (actions 5 - 8)

      Action.................   2    1. List system IDs
                                     2. Work with account profiles
                                     3. List user IDs
                                     4. Work with user profiles
                                     5. Change a user's password
                                     6. Reset a user's password
                                     7. Reset a user's session
                                     8. Information about last active user session
                                     9. Work with messages
```

Choose Action 2

Fill in the account ID you want to work with

```
  M1300US                      Work with Account Profiles

    Account ID...........  ACCT1    (actions 1 - 6)
    Profile type.........   __      (actions 3 and 4)

    Action..............    1    1. Browse an account profile
                                  2. Change an account profile
                                  3. Browse a profile type
                                  4. Change a profile type
                                  5. Change multiple users' profile types
                                  6. List user IDs
                                  7. Work with groups
```

Choose Action 1

You see a panel like this one.

Information Exchange Administration Services displays the Browse an Account Profile panel

```
  M1350US                    Browse an Account Profile

    Account ID.............  ACCT1

    Allow unrestricted communication within account? (Y/N)......... N
    Allow users in the account to exchange Internet messages? (Y/N) N

    Account alternate administrators
      Account ID   User ID   Authority (A/M/N/S)
      ACCT2                      A
      ACCT1        USER2         M


    Profile type (optional)........   __
    Date created-date modified.....  02/05/99 - 02/15/99
    Last user to modify...........  ACCT1     - USER1



  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

Browsing a profile type

To browse a profile type, follow this path.

```
M1000US                     Work with Profiles

   Account ID..............  ACCT1    (actions 5 - 8)
   User ID.................  USER1    (actions 5 - 8)

   Action.................   2   1. List system IDs
                                 2. Work with account profiles
                                 3. List user IDs
                                 4. Work with user profiles
                                 5. Change a user's password
```

Choose Action 2

Fill in the account ID
and the profile type you
want to browse

Choose Action 3

```
M1300US                     Work with Account Profiles

   Account ID...........  ACCT1    (actions 1 - 6)
   Profile type........  02        (actions 3 and 4)

   Action..............   3   1. Browse an account profile
                              2. Change an account profile
                              3. Browse a profile type
                              4. Change a profile type
                              5. Change multiple users' profile types
                              6. List user IDs
```

You can view the settings
for a specific profile type

Press F8 to move to the
second Browse a Profile
Type panel

```
M1351US                  Browse a Profile Type          (Panel 1 of 2)

   Account ID...............  ACCT1
   Profile type.............  02

   As sender (Y/N):
     Pay for sending?... N   Pay for receiving?... N   Block communication?... N
   As receiver (Y/N):
     Pay for sending?... N   Pay for receiving?... N   Block communication?... N

   As carbon copy partner (Y/N):
     Pay for processing?............. N        Pay for receiving?............. N
   As carbon copy recipient (Y/N):
     Pay for processing?............. N        Pay for receiving?............. N

   Forced archiving? (Y/N)........... N     Archive days (Max 365 )........ 000
   Number of audit/session/event
     days ( 015 to 045 )............. 015



   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward
```

You see a panel like this one.

```
M1352US                  Browse a Profile Type          (Panel 2 of 2)

   Account ID...............  ACCT1
   Profile type.............  02

   Change acct dist list/groups? (Y/N)  N   Change other users' profiles? (Y/N)  N
   Change user's own profile? (Y/N)...  N   Change libraries? (Y/N)............  N
   Reset session? (Y/N)..............   Y   Change alias? (Y/N)...............   N
   Use purge message command? (Y/N)...  N   Perform X.400 updates? (Y/N).......  N
   Extended security user? (Y/N)......  N   Immediate delivery recipient? (Y/N)  N
   Deliver messages in sequence? (Y/N)  N
```

Press F7 to return to the
first Browse a Profile Type
panel

Changing an account profile

A profile for your account is created when you order Information Exchange. You can change the account profile to match how users in your organization communicate.

Follow this path.

Fill in the ID of the account you want to work with

Choose Action 2

```
M1000US                      Work with Profiles

Account ID..............  ACCT1     (actions 5 - 8)
User ID.................  USER1     (actions 5 - 8)

Action.................  2    1. List system IDs
                              2. Work with account profiles
                              3. List user IDs
                              4. Work with user profiles
                              5. Change a user's password
```

Choose Action 2

```
M1300US                  Work with Account Profiles

Account ID..........  ACCT1   (actions 1 - 6)
Profile type.........  __      (actions 3 and 4)

Action..............  2    1. Browse an account profile
                            2. Change an account profile
                            3. Browse a profile type
                            4. Change a profile type
                            5. Change multiple users' profile types
                            6. List user IDs
                            7. Work with groups
```

You see a panel like this one.

The ID of the account you are changing is filled in

All service administrators in ACCT2 and USER2 in ACCT1 will be alternate administrators

You can go directly to the Change a Profile Type panel by filling in a profile type in this field

```
M1310US                  Change an Account Profile

Account ID.............  ACCT1

Allow unrestricted communication within account? (Y/N)......... N
Allow users in the account to exchange Internet messages? (Y/N) N

Account alternate administrators
  Account ID   User ID   Authority code (A/M/N/S)
  ACCT2                    A
  ACCT1         USER2      A
  _____     _____    _
  _____     _____    _

Profile type (optional)........  __
Date created-date modified.....  02/08/99 - 02/22/99
Last user to modify...........  ACCT1    - USER1


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

The default setting for "Allow unrestricted communication within account" is **n**. This means that trading partner lists, user profiles, and user groups are used to control communications within the account. If you want all users in the account to exchange mail without restriction, set the "Allow unrestricted communication within account" field to **y**.

The default setting for "Allow users in the account to exchange Internet messages" is **n**. This means that no users in the account can exchange messages with Internet users or access any of the available Internet Services panels within Information Exchange Administration Services. If you want to allow all users in the account to exchange messages with Internet users or to access any of the available Internet Services panels within Information Exchange Administration Services, set this field to **y**.

See Chapter 7, "Working with trading partners," for more information on trading partner lists. See Chapter 6, "Working with user profiles," for more information on user profiles. See Chapter 8, "Working with user groups," for more information on user groups.

To set up a specific user as an alternate administrator for the account, fill in the user's account ID, user ID, and the authority code you want to assign. To enable all service administrators in a different account to act as alternate administrators, type only the account ID.

If you are unsure what authority code to use, see "Looking at the information in an account profile" on page 46.

> NOTE: Another method of assigning a service administrator is to give a user inside the account the authority to be a permanent Information Exchange Service Administrator. To do this, set the authorization level in the user's profile to 4. See Chapter 6, "Working with user profiles," for more information.

Setting up profile types

You can use profile types to group users who share communication characteristics.

If you want to change a profile type, follow this path.

```
M1000US                      Work with Profiles

   Account ID.............  ACCT1     (actions 5 - 8)
   User ID................  USER1     (actions 5 - 8)

   Action.................  2     1. List system IDs
                                  2. Work with account profiles
                                  3. List user IDs
                                  4. Work with user profiles
                                  5. Change a user's password
```

Choose Action 2

```
M1300US                      Work with Account Profiles

   Account ID..........  ACCT1     (actions 1 - 6)
   Profile type.........  02        (actions 3 and 4)

   Action.............  4     1. Browse an account profile
                              2. Change an account profile
                              3. Browse a profile type
                              4. Change a profile type
                              5. Change multiple users' profile types
                              6. List user IDs
                              7. Work with groups
```

Fill in the profile type you want to change

Choose Action 4

You see a panel like this.

Use these fields to set payment levels for this profile type

Use these fields to set choices for archiving and audit trails

Press F8 to move to the second profile type panel

```
M1311US                   Change a Profile Type            (Panel 1 of 2)

  Account ID...............  ACCT1
  Profile type.............  02

As sender (Y/N):
   Pay for sending?... N   Pay for receiving?... N   Block communication?... N
As receiver (Y/N):
   Pay for sending?... N   Pay for receiving?... N   Block communication?... N

As carbon copy partner (Y/N):
   Pay for processing?............. N        Pay for receiving?............. N
As carbon copy recipient (Y/N):
   Pay for processing?............. N        Pay for receiving?............. N

Forced archiving? (Y/N)........... N      Archive days (Max 365 )........ 000
Number of audit/session/event
   days ( 015 to 045 )............. 015


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward  F12=Cancel
```

Here is the second panel.

Fill in the information

Use these fields to specify the capabilities of users with this profile type

```
M1312US                   Change a Profile Type            (Panel 2 of 2)

  Account ID...............  ACCT1
  Profile type.............  02

  Change acct dist list/groups? (Y/N)  N   Change other users' profiles? (Y/N)  N
  Change user's own profile? (Y/N)... N   Change libraries? (Y/N)...........  N
  Reset session? (Y/N).............. Y   Change alias? (Y/N)...............  N
  Use purge message command? (Y/N)... N   Perform X.400 updates? (Y/N).......  N
  Extended security user? (Y/N)...... N   Immediate delivery recipient? (Y/N)  N
  Deliver messages in sequence? (Y/N)  N
```

If you are unsure of how to fill in this panel, see "Looking at the information in a profile type" on page 48.

NOTE: If you change any of the profile types from 1–20, the user profile of each user using the specified profile type is modified with the changes made to that profile type. For example, if changes are made to profile type 02, all users with a profile type of 02 will have the same changes made to their profile.

Working with user profiles

A *user profile* defines an individual user's characteristics and sets up which functions users can perform in Information Exchange. You can assign an existing profile type to a user, or you can set up a unique profile for the user. For more information on profile types, see Chapter 5, "Working with account profiles."

This chapter covers the following:

Understanding user profiles

A user's profile defines how that user works with Information Exchange and what functions the user is authorized to perform. The user's initial profile is determined by the profile type that network registration personnel used when the user ID was ordered.

Looking at the information in a user profile

Much of the information is the same as the information in a profile type. If you change any of the information that came from the profile type, you will create a unique profile for that user.

You can change the following fields without creating a unique profile:

- "Authorization level"
- "Language suffix"
- "Support can access messages?"
- "Date format"
- "Time zone"
- "User alternate administrator"

Here is a complete list of the information in a user profile:

- **As sender (Y/N):**
  These payment levels define whether the user is willing (**y**) or is not willing (**n**) to pay when sending messages.

  - Pay for sending?
    This specifies the user's willingness to pay the send-side charge when sending a message.

  - Pay for receiving?
    This specifies the user's willingness to pay the receive-side charge when sending a message.

  - Block communication?
    This specifies that the user wants to block sending messages.

The following combinations are valid for Sending (**S**), Receiving (**R**), and Blocking (**B**) communications:

S	R	B	The sender:
Y	N	N	Is willing to pay only the send-side charge.
Y	Y	N	Is willing to pay both the send-side and receive-side charge.
N	N	N	Is not willing to pay any charges.
N	N	Y	Has communications blocked for sending messages.

■ **As receiver (Y/N):**
These payment levels define whether the user is willing (**y**) or is not willing (n) to pay when receiving messages.

  • Pay for sending?
    This specifies the user's willingness to pay the send-side charge when receiving a message.

  • Pay for receiving?
    This specifies the user's willingness to pay the receive-side charge when receiving a message.

  • Block communication?
    This specifies that the user wants to block receiving messages.

The following combinations are valid for Sending (**S**), Receiving (**R**), and Blocking (**B**) communications:

S	R	B	The receiver:
N	Y	N	Is willing to pay only the receive-side charge.
Y	Y	N	Is willing to pay both the send-side and receive-side charge.
N	N	N	Is not willing to pay any charges.
N	N	Y	Has communications blocked for receiving messages.

NOTE: You must set payment levels for both sending and receiving.

■ **As carbon copy partner:**
These payment levels define whether the user is willing (**y**) or is not willing (**n**) to pay when the user is a carbon copy partner.

  • Pay for processing?
    This specifies the user's willingness to pay the carbon copy processing charge.

  • Pay for receiving?

This specifies the user's willingness to pay the carbon copy receive-side charge.

The following combinations are valid for the carbon copy Processing (**P**) charge and the carbon copy Receive (**R**) charge for a carbon copy partner.

P	R	The carbon copy partner (CCP):
Y	Y	The user is willing to pay both the carbon copy processing charge and the carbon copy receive-side charge when the user is a carbon copy partner.
Y	N	The user is willing to pay only the carbon copy processing charge when the user is a carbon copy partner.
N	Y	The user is willing to pay only the carbon copy receive-side charge when the user is a carbon copy partner.
N	N	The user is not willing to pay either charge when the user is a carbon copy partner.

■ **As carbon copy recipient:**
These payment levels define whether the user is willing (**y**) or is not willing (**n**) to pay when the user is a carbon copy recipient.

- Pay for processing?
  This specifies the user's willingness to pay the carbon copy processing charge.

- Pay for receiving?
  This specifies the user's willingness to pay the carbon copy receive-side charge.

The following combinations are valid for the carbon copy Processing (**P**) charge and the carbon copy Receive (**R**) charge for a carbon copy recipient.

P	R	The carbon copy recipient (CCR):
Y	Y	The user is willing to pay both the carbon copy processing charge and the carbon copy receive-side charge when the user is a carbon copy recipient.
Y	N	The user is willing to pay only the carbon copy processing charge when the user is a carbon copy recipient.
N	Y	The user is willing to pay only the carbon copy receive-side charge when the user is a carbon copy recipient.
N	N	The user is not willing to pay either charge when the user is a carbon copy recipient.

See the *Information Exchange Charges Reference* for more information.

NOTE: Many users want to restrict the number of users with whom they exchange mail. You can do this for your users by setting the "Block communication" fields in the profile type to **y** and creating a list of trading partners for the user. For more information, see Chapter 7, "Working with trading partners."

- **Forced archiving (Y/N)**
  The *archive* is a place in the system where mail is stored when it is received. This field specifies whether the user will have their received mail stored in the archive automatically.

  If "Forced archiving" is set to **n**, users must specifically request archiving when receiving mail in order to have mail stored in the archive.

  > NOTE: Archiving is a billable function, based on the message size and the number of days the message remains in archive.
  >
  > Charges are incurred when the message is deleted.

- **Archive days**
  This is the maximum number of days a message will be stored in the archive. The number must be equal to or below the maximum displayed on the panel.

  > NOTE: If you specify n for forced archiving and the number of days is zero, even if the user specifies archiving in the Information Exchange receive command, the request for archiving is ignored.

- **Authorization leve**l
  The authorization level for a service administrator is **04**. The authorization level for a general user is **06**.

- **Number of audit/session/event days**
  - Audit days
    The audit trail saves information about messages and the status of messages. The audit trail for a message is created when a message is sent. This number of days is used to determine how long the audit for a message remains after the final status of the message is known.

    For example, if the final status of a message is known in 10 days and the audit trail days specified is 15 days, the audit trail is saved for 25 days.

  - Session days
    The session trace saves information about Information Exchange sessions and receives. The session trace is created when a user starts a session or issues a receive command. The session trace remains for the number of days specified.

  - Event days
    The event trail saves information about message arrival, scheduled, and user initiated events. The event trail is created when an event occurs and remains for the number of days specified.

    > NOTE: The "event" portion of this field does not display on systems that do not use Event Services.

- **Language suffix**
  The default language is provided by the system. Information Exchange can display panels in another language if the panels exist in the system in that language. If the panels do not exist in that language, Information Exchange continues to display the default panels.

- **Cluster mailbox user? (Y/N)**
  At registration, this field is set to **y** to define a cluster user ID. For more information on cluster mailbox user IDs, see "Cluster user registration" on page 32.

■ **Number of mailboxes**
This field contains the number of cluster mailboxes associated with the user ID. The possible number of mailboxes is 2–99. Noncluster users must have this field set to zero.

■ **Change acct dist list/groups? (Y/N)**
Set this field to **y** to let the user add, change, or delete account-level distribution lists and groups.

■ **Change other users' profiles? (Y/N)**
Set this field to **y** to let the user change other users' profiles and trading partner lists within their account. If this field is set to **y**, the user can also change and reset passwords for all users in their account.

■ **Change user's own profile? (Y/N)**
Set this field to **y** to let users change their own profile and their trading partner lists. If you set this field to **n**, users cannot change their own profile or trading partner lists, but they can change or reset their own password.

■ **Reset session? (Y/N)**
Set this field to **y** to let users reset their own session statistics.

■ **Change alias? (Y/N)**
Set this field to **y** to let the user add, change, or delete global or organizational alias tables.

■ **Extended security user? (Y/N)**
Set this field to **y** to make the user an extended security (ESO) user. Extended security users have additional password restrictions. For information on ESO security enhancements, see "Setting up stricter security" on page 10.

 NOTE: If you change existing non-ESO users to ESO users, the users' passwords are revoked. You must reset or change them for the users to be able to log on.

■ **Change libraries? (Y/N)**
Set this field to **y** to let users add, change, or delete libraries and members within their account.

■ **Immediate delivery recipient? (Y/N)**
This lets users receive express priority messages.

An express priority message is placed ahead of other messages in a user's mailbox. It must be received immediately. The message will be discarded if the user to whom the message is sent does not have a session with Information Exchange and is not receiving messages.

■ **Support can access messages? (Y/N)**
Set this field to **y** to allow support personnel to access the user's messages.

■ **Use purge message command? (Y/N)**
Set this field to y to let users use the Purge message command from an Expedite product or any other product that supports the Purge message command.

■ **Perform X.400 updates? (Y/N)**
Set this field to **y** to let the user add or copy X.400 user profiles, or add, change, or delete X.400 trading partner attributes.

■ **Deliver messages in sequence? (Y/N)**
Set this field to **n** for maximum availability of Information Exchange and for best perfor-
mance. Set this field to **y** if a trading partner requires mail posted to the mailbox in the
sequence it is sent.

This is usually important only if the trading partner is in the process of receiving. Messages
not received always appear in the mailbox in the order sent.

> NOTE: This option is available if the sender and the receiver of the message are
> on the same Information Exchange system.

■ **User preferences for:**
  • "Date format"
  • "Time zone"

■ **User alternate administrators**
A user alternate administrator can perform tasks for the user if the user is, for example, away
from the office temporarily. You can designate up to four alternates for a user.

To set up another user as an alternate administrator for the user whose profile you are changing,
include the administrator's account ID and user ID. To enable all service administrators in a
different account to act as alternate administrators for the user whose profile you are changing,
include only the administrator's account ID.

> NOTE: You cannot designate an account-level administrator by setting the "User
> alternate administrator" fields. If you want to designate administrators with authority
> over an account, see "Looking at the information in an account profile" on page 46 and
> "Delegating authority to alternate administrators" on page 8.

For "Authority Code," fill in the code that specifies the type of administrator you want the user to
be:

This type:	Can do this:
A	All functions the user can perform.
M	Only view mail for the user.
N	All functions the user can perform except viewing and deleting mail.
S	All functions the user can perform except viewing and deleting mail, but can view messages for account ID *SYSTEM*.

■ **Created**
This shows you when the user profile was created.

■ **Last changed by user**
This shows you which user made the latest change to the user profile.

■ **Last changed on**
This shows you when the last change was made to the user profile.

■ Even if the value of "Change other users' profiles?" or "Change user's own profile?" is y, general users and user alternate administrators cannot change the following fields:

- "Authorization level"
- "Change acct dist list/groups?"
- "Change other users' profiles?"
- "Change user's own profile?"
- "Change alias?"
- "Change libraries?"
- "Use purge message command?"
- "Perform X.400 updates?"
- "Profile types"
- "Cluster mailbox user?"
- "Number of mailboxes"
- "Deliver messages in sequence?"

Looking at cluster mailbox users

A cluster mailbox user has a set of mailboxes that appear as one mailbox to trading partners. This one mailbox is known as the cluster parent user ID. Mail items sent to a parent user ID are routed to a child user ID mailbox. The cluster owner manages the session of each child user ID.

This has the following advantages:

■ The owner can perform high-volume, simultaneous processing.
■ The owner can manage data more effectively without disrupting trading partners.
■ The owner can request a change in the number of child mailboxes without affecting their trading partners.

You can request to:

■ Add a new user as a cluster mailbox user.
■ Change a current user to a cluster mailbox user.
■ Increase or decrease the number of mailboxes in a cluster.
■ Change a cluster mailbox user to a regular user.

You can request any of these changes by placing a registration order. Service administrators cannot change the cluster user fields. For more information on cluster user IDs, see Chapter 3, "Understanding the cluster mailbox."

Comparing profiles and profile types

Since you probably have some users that share characteristics, it may be easier for you to use a profile type instead of setting up individual user profiles. That way, in one step, you can manage all users that share characteristics.

If you decide that you cannot use a profile type, you can give the user a unique set of characteristics. You do this by creating an individual profile for the user. If any information you put in a user profile conflicts with settings in the previously assigned profile type, the user's profile type changes to 00.

Browsing a user's profile

To browse a user's profile, follow this path.

```
M0000US          Information Exchange Administration Services
                              Main Menu
                           System ID : SY1

Action 1    Work with one of the following:
                 1. Profiles
                 2. Alias tables
                 3. Distribution lists
                 4. Messages
```

Choose Action 1

```
M1000US                      Work with Profiles

  Account ID............. ACCT1    (actions 5 - 8)
  User ID................ USER1    (actions 5 - 8)

  Action................. 3   1. List system IDs
                              2. Work with account profiles
                              3. List user IDs
                              4. Work with user profiles
                              5. Change a user's password
```

Choose Action 3

```
M1200US                      List User IDs

  Account ID............. ACCT1

  Start at user ID.....  _____  (press Enter)

  Code (multiple selection):
   S = Select user

 s USER1      _ USER2     _ USER3     _ USER4     _ USER5     _ USER6
 _ USER7      _ USER8     _ USER9     _ USER10    _ USER11    _ USER12
 s USER13     _ USER14    _ USER15    _ USER16    _ USER17    _ USER18
 _ USER19     _ USER20    _ USER21    _ USER22    _ USER23    _ USER24
```

Fill in S next to each user profile you want to browse

You see a panel like this one.

```
M1400US                   Work with User Profiles

  Account ID............. ACCT1    (actions 1 - 3, and 5)
  User ID................ USER1    (actions 1, 2, and 5)
  Profile type........... __

  Action................. 1   1. Browse a user's profile
                              2. Change a user's profile
                              3. Change multiple users' profile types
                              4. Work with trading partners
                              5. Add and delete a user from groups
                              6. Work with event profiles
```

You see the first user ID you selected from the list.

Choose Action 1

There are three panels of user profile information.

Panel 1 of Browse a
User's Profile

```
M1450US                 Browse a User's Profile            (Panel 1 of 3)

Account ID / user ID......  ACCT1     / USER1
Profile type.............  00

As sender (Y/N):
  Pay for sending?... Y   Pay for receiving?... Y   Block communication?.. N
As receiver (Y/N):
  Pay for sending?... N   Pay for receiving?... N   Block communication?.. N

As carbon copy partner (Y/N):
  Pay for processing?............. N      Pay for receiving?............. N
As carbon copy recipient (Y/N):
  Pay for processing?............. N      Pay for receiving?............. N

Forced archiving? (Y/N)........... N     Archive days (Max 365 )......... 000
Authorization level (1-6)......... 4     Number of audit/session/event
Language suffix (Default US )...... US    days ( 015  - 045 )............ 015
Cluster mailbox user? (Y/N)........ N     Number of mailboxes (2-99)...... 00
```

Panel 2 of Browse a
User's Profile

```
M1451US                 Browse a User's Profile            (Panel 2 of 3)

Account ID / user ID......  ACCT1     / USER1
Profile type.............  00

Change acct dist list/groups? (Y/N)  Y   Change other users' profiles? (Y/N)  Y
Change user's own profile? (Y/N)...  Y   Reset session? (Y/N)...............  Y
Change alias? (Y/N)...............   Y
Extended security user? (Y/N)......  N   Change libraries? (Y/N)............  Y
Immediate delivery recipient? (Y/N)  Y   Support can access messages? (Y/N).  N
Use purge message command? (Y/N)...  N   Perform X.400 updates? (Y/N).......  Y
Deliver messages in sequence? (Y/N)  N



Date format....................... MM / DD / YY (Ex-YY/MM/DD or MM/DD/YY)
Time zone......................... EST          (Ex-EST or GMT)
```

Panel 3 of Browse a
User's Profile

```
M1452US                 Browse a User's Profile            (Panel 3 of 3)

  Account ID / user ID....  ACCT1     / USER1
  Profile type...........  00


  User alternate administrators
   Account        User      Authority Code
     ID            ID         (A/M/N/S)
   ACCT1         USER4           M




  Maintenance statistics
    Created............... 02/12/98
    Last changed by User.. ACCT1    USER1
    Last changed on....... 02/20/99
```

Changing a user's profile

To change a user's profile, follow this path.

```
M1000US                     Work with Profiles

  Account ID.............  ACCT1    (actions 5 - 8)
  User ID................  USER1    (actions 5 - 8)

  Action.................  3    1. List system IDs
                                2. Work with account profiles
                                3. List user IDs
                                4. Work with user profiles
                                5. Change a user's password
```

Choose Action 3

```
M1200US                     List User IDs

  Account ID.............  ACCT1

  Start at user ID.....  _____  (press Enter)

  Code (multiple selection):
   S = Select user

  s USER1     _ USER2     _ USER3     _ USER4     _ USER5     _ USER6
  _ USER7     _ USER8     _ USER9     _ USER10    _ USER11    _ USER12
  s USER13    _ USER14    _ USER15    _ USER16    _ USER17    _ USER18
  _ USER19    _ USER20    _ USER21    _ USER22    _ USER23    _ USER24
```

Fill in S next to each user profile you want to work with

```
M1400US                     Work with User Profiles

  Account ID.............  ACCT1     (actions 1 - 3, and 5)
  User ID................  USER1     (actions 1, 2, and 5)
  Profile type...........  __

  Action.................  2   1. Browse a user's profile
                               2. Change a user's profile
                               3. Change multiple users' profile types
                               4. Work with trading partners
```

You see the first user ID you selected from the list

Choose Action 2

There are three panels of user profile information.

Fill in a profile type here
and press Enter to assign
another profile type to
the user

```
M1410US                     Change a User's Profile            (Panel 1 of 3)

Account ID / user ID......  ACCT1    / USER1
Profile type..............  01

As sender (Y/N):
  Pay for sending?... Y   Pay for receiving?... Y   Block communication?..  N
As receiver (Y/N):
  Pay for sending?... N   Pay for receiving?... N   Block communication?..  N

As carbon copy partner (Y/N):
  Pay for processing?.............. N      Pay for receiving?............. N
As carbon copy recipient (Y/N):
  Pay for processing?.............. N      Pay for receiving?............. N

Forced archiving? (Y/N)........... N     Archive days (Max 365 )......... 000
Authorization level (1-6)......... 4     Number of audit/session/event
Language suffix (Default US )..... US     days ( 015  - 045 )............. 015
Cluster mailbox user? (Y/N)....... N     Number of mailboxes (2-99)...... 00
```

If you change any field
that is set by the profile
type, you will create a
unique profile for the
user

```
M1411US                     Change a User's Profile            (Panel 2 of 3)

Account ID / user ID......  ACCT1    / USER1
Profile type..............  01

Change acct dist list/groups? (Y/N)  N    Change other users' profiles? (Y/N)  N
Change user's own profile? (Y/N)...  N    Reset session? (Y/N)..............  Y
Change alias? (Y/N)...............   N
Extended security user? (Y/N)......  N    Change libraries? (Y/N)...........  Y
Immediate delivery recipient? (Y/N)  N    Support can access messages? (Y/N).  N
Use purge message command? (Y/N)...  N    Perform X.400 updates? (Y/N).......  N
Deliver messages in sequence? (Y/N)  N


Fill in the user's preference for the following fields.
Date format....................... MM / DD / YY (Ex-YY/MM/DD or MM/DD/YY)
Time zone......................... EST         (Ex-EST or GMT)
```

Your settings for these
fields will not override a
service administrator's
authority

User alternate admin-
istrators do not have
service administrator
authority

```
M1412US                     Change a User's Profile            (Panel 3 of 3)

  Account ID / user ID....  ACCT1    / USER1
  Profile type...........   01


  User alternate administrators
    Account       User       Authority Code
      ID           ID          (A/M/N/S)
    ACCT1        USER4            M

    _____      _____          _
    _____      _____          _
    _____      _____          _

  Maintenance statistics
    Created..............  02/12/98
    Last changed by User.. ACCT1    USER1
    Last changed on.......  02/20/99
```

If you want to assign a different profile type to the user, type the numerical value of the profile you want in the "Profile type" field and press Enter.

The values from that profile type replace the values currently assigned.

If you are unsure of how to fill in any of the other fields on these panels, see "Looking at the information in a user profile" on page 64.

Assigning profile types to multiple users

If you want to change the profile type for more than one user at time, you can work from a list of user IDs instead of working individually with users.

Follow this path.

```
M1000US                    Work with Profiles

   Account ID.............  ACCT1   (actions 5 - 8)
   User ID................  USER1   (actions 5 - 8)

   Action.................  4    1. List system IDs
                                  2. Work with account profiles
                                  3. List user IDs
                                  4. Work with user profiles
                                  5. Change a user's password
```

Choose Action 4

```
M1400US                    Work with User Profiles

   Account ID.............  ACCT1   (actions 1 - 3, and 5)
   User ID................  USER1   (actions 1, 2, and 5)
   Profile type...........  __

   Action.................  3    1. Browse a user's profile
                                  2. Change a user's profile
                                  3. Change multiple users' profile types
                                  4. Work with trading partners
                                  5. Add and delete a user from groups
                                  6. Work with event profiles
```

Choose Action 3

You see a panel like this one.

You see the profile type currently assigned to the users

```
M1440US                 Change Multiple Users' Profile Type

   Account ID.............  ACCT1

   Start at user ID........  _____   (press Enter)


Profile  User ID   Profile  User ID   Profile  User ID   Profile  User ID
 type               type               type               type
 01      USER1      02      USER2      01      USER3      01      USER4
 02      USER5      01      USER6      03      USER7      01      USER8
 03      USER9      01      USER10     02      USER11     02      USER12
 01      USER13     04      USER14     01      USER15     01      USER16
 01      USER17     06      USER18     00      USER19     02      USER20
 06      USER21     01      USER22     01      USER23     01      USER24
 01      USER25     01      USER26     03      USER27     01      USER28
 02      USER29     01      USER30     04      USER31     06      USER32
 02      USER33     00      USER34     01      USER35     01      USER36
 01      USER37     01      USER38     06      USER39     01      USER40


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward  F8=Forward  F12=Cancel
```

To change a user's profile type, type the new profile type over the existing one. You can change more than one user at a time.

When you finish making changes, press F3 to save your changes and leave the panel.

NOTE: For cluster user IDs, only the parent user ID displays on the "Change Multiple User's Profile Types" panel.

Assigning profile types to multiple users

Working with trading partners

A *trading partner* is a business associate with whom users exchange information electronically. Using Information Exchange Administration Services, you can create a list of trading partners for a user to control the flow of communications with trading partners. Information Exchange refers to the trading partner list first when determining whether users can communicate with each other. This includes how payment levels are set for regular and carbon copy messages. For more information, see Chapter 4, "Understanding payment level resolution."

A user can have only one trading partner list. A trading partner list contains information that specifies:

■ With whom users can or cannot communicate
■ How to charge for messages exchanged between trading partners
■ How to charge for carbon copy messages requested by trading partners

As the service administrator, you can maintain a user's trading partner list, or the individual user can maintain it. However, for individual users to be able to maintain their own trading partner list, they must also be able to change their own user profile. This means, the "Change user's own profile" field in the user profile must be set to **y**.

You can restrict a user's communications to only those on a user's list of trading partners. To do this, you must specify **y** in both "Block communications" fields in the user's profile.

This chapter covers the following:

Looking at trading partner information

This is the information you use when you add, browse, change, or copy trading partner information.

■ **User**
This is the system ID (if on another system), account ID, and user ID of the trading partner.

■ **Alias**
This is the alias table type, the alias table name, and the alias name you use to refer to the trading partner. The alias table types are:

- **G** for global
- **O** for organizational
- **P** for private

■ **As sender (Y/N)**
- Pay for sending?
  Is the owner of the trading partner list willing to pay the send-side charge when sending a message to this trading partner?

- Pay for receiving?
  Is the owner of the trading partner list willing to pay the receive-side charge when sending a message to this trading partner?

- Block communications?
  Does the owner of the trading partner list want to block communications when sending messages to this trading partner?

■ **As receiver (Y/N)**
- Pay for sending?
  Is the owner of the trading partner list willing to pay the send-side charge when receiving a message from this trading partner?

- Pay for receiving?
  Is the owner of the trading partner list willing to pay the receive-side charge when receiving a message from this trading partner?

- Block communications?
  Does the owner of the trading partner list want to block communications when receiving messages from this trading partner?

■ **As carbon copy partner (Y/N)**
- Pay for processing?
  Is the owner of the trading partner list willing to pay the carbon copy processing charge when the owner is the partner in a carbon copy relationship requested by this trading partner?

- Pay for receiving?
  Is the owner of the trading partner list willing to pay the carbon copy receive-side charge when the owner is the partner in a carbon copy relationship requested by this trading partner?

- **As carbon copy recipient (Y/N)**
  - Pay for processing?
    Is the owner of the trading partner list willing to pay the carbon copy processing charge when the owner is the recipient of a carbon copy requested by this trading partner?

  - Pay for receiving?
    Is the owner of the trading partner list willing to pay the carbon copy receive-side charge when the owner is the recipient of a carbon copy requested by this trading partner?

- **Require partner to be ESO? (Y/N)**
  With this field, you can apply an Extended Security Option restriction to the exchange of mail between two users.

  - If you type **y** and the owner of the trading partner list is an ESO user, mail can only be exchanged if the partner is also an ESO user.

  - If you type **y** and the owner of the trading partner list is not an ESO user, mail can be exchanged regardless of whether the partner is an ESO user.

  - If you type **n**, the system does not check the "ESO Ind" field in the user's profile to determine communications.

  For more information, see "Setting up stricter security" on page 10.

- **Last changed on**
  This is the date this entry in the trading partner list was last changed.

- **Last changed by**
  This is the account ID and user ID of the user who last made changes to this entry in the trading partner list.

This table lists how the following fields display on the List Trading Partners panel.

This field:	Displays as:
As sender (Y/N)	Send
Pay for sending?	S
Pay for receiving?	R
Block communications?	B
As receiver (Y/N)	Receive
Pay for sending?	S
Pay for receiving?	R
Block communications?	B
As carbon copy partner (Y/N)	CCP
Pay for processing?	P
Pay for receiving?	R
As carbon copy recipient (Y/N)	CCR
Pay for processing?	P

This field:	Displays as:
Pay for receiving?	R

Understanding sending and receiving charges

Every time trading partners exchange messages with each other, Information Exchange assigns two charges:

- A send-side charge for sending the message
- A receive-side charge for receiving the message

If both trading partners are on the same Information Exchange system, these charges may be:

- Paid by the sender
- Paid by the receiver
- Split between the sender and the receiver

When a sender sends a message to a trading partner connected to a messaging service other than the user's local Information Exchange system, restrictions on payment options may apply. For more information, see the *Information Exchange Charges Reference.*

Information Exchange uses two kinds of information to resolve charges for each message:

- A message charge code (1 - 6) used by several Information Exchange Administration Services functions to specify the requested payment resolution.

- Payment-level information in users' trading partner lists or user profiles that specifies their willingness to pay.

When both the sender and receiver are on the same Information Exchange system, payment-level information from both is used to resolve charges.

When the sender and receiver are not on the same system, restrictions on payment options may apply.

When you send Internet messages, only send-side message charges are incurred; you must agree to pay these charges. Similarly, when you receive Internet messages, only receive-side message charges are incurred; you must agree to pay these charges. There are no message charges for messages received from account ID *SYSTEM* and user ID *SMTPGW*.

When you send X.400 messages from Information Exchange, as the sender, you pay all the charges for an outgoing message; you must agree to pay these charges. However, you do not pay any charges for the following:

- Incoming X.400 messages
- Receiving and viewing messages from account ID *SYSTEM* and user ID **X400**

Understanding carbon copy charges

The carbon copy function enables the delivery of an electronic copy, or carbon copy, of a message to one or more recipients. Sending and receiving carbon copy messages result in additional message charges that derive from:

- Processing (generating) the carbon copy
- Receiving the carbon copy

If any of the users involved in the generation of a carbon copy are connected to a message service other than the user's local Information Exchange system, restrictions on payment options apply. For more information, see the *Information Exchange Charges Reference*.

Information Exchange uses the following two kinds of information to resolve charges for each carbon copy message:

- Information about the user who is designated to pay the carbon copy charges as specified by the carbon copy requester.

- Information about the payment-level as specified in users' trading partner lists or users' profiles, which specifies their willingness to pay carbon copy charges.

Specifying payment levels in a trading partner list

When you set up trading partners for the users you support, you must specify who pays the message charges when users send or receive messages.

Here are some things to note:

■ Payment levels must be set for both sending and receiving regular messages.

■ Payment levels must be set for both processing and receiving carbon copy messages.

■ Payment levels set for each trading partner override the general payment level specified in the user's profile or the profile type.

Specifying sending and receiving payment levels

You must specify the "As sender" and "As receiver" payment levels for each trading partner in the list.

Specifying send-side payment levels

The following is the send-side payment level information in a trading partner list.

■ **As sender (Y/N):**
Send-side payment levels define whether the user will (**y**) or will not (**n**) pay when sending messages to this partner.

• Pay for sending?
Is the owner of the trading partner list willing to pay the send-side charge when sending a message to this trading partner?

• Pay for receiving?
Is the owner of the trading partner list willing to pay the receive-side charge when sending a message from this trading partner?

• Block communication?
Does the owner of the trading partner list want to block sending messages to this trading partner?

The following combinations are valid for **S**ending (**S**), **R**eceiving (**R**), and **B**locking (**B**) communications:

S	R	B	The sender:
Y	N	N	Is willing to pay only the send-side charge.
Y	Y	N	Is willing to pay both the send-side and receive-side charge.
N	N	N	Is not willing to pay any charge.
N	N	Y	Is blocked from sending communications.

Specifying receive-side payment levels

The following is the receive-side payment level information in a trading partner list.

- **As receiver (Y/N):**
  Receive-side payment levels define whether the user will (**y**) or will not (n) pay when receiving messages from this trading partner.

  - Pay for sending?
    Is the owner of the trading partner list willing to pay the send-side charge when receiving a message from this trading partner?

  - Pay for receiving?
    Is the owner of the trading partner list willing to pay the receive-side charge when receiving a message from this trading partner?

  - Block communication?
    Does the owner of the trading partner list want to block receiving messages from this trading partner?

  The following combinations are valid for Sending (**S**), Receiving (**R**), and Blocking (**B**) communications:

S	R	B	The receiver:
N	Y	N	Is willing to pay only the receive-side charge.
Y	Y	N	Is willing to pay both the send-side and receive-side charge.
N	N	N	Is not willing to pay any charge.
N	N	Y	Is blocked from receiving communications.

Specifying carbon copy payment levels

You must specify the "As carbon copy partner" and "As carbon copy recipient" payment levels for each trading partner on the list.

- **As carbon copy partner (Y/N):**
  You can specify a user's willingness to pay charges when the user is a carbon copy partner.

  - Pay for processing?
    This specifies the user's willingness to pay the carbon copy processing charge.

  - Pay for receiving?
    This specifies the user's willingness to pay the carbon copy receive-side charge.

Specifying carbon copy partner payment levels
The following combinations are valid for the carbon copy Processing (**P**) charge and the carbon copy Receive (**R**) charge.

P	R	The carbon copy partner (CCP):
Y	Y	The owner of the trading partner list is willing to pay both the carbon copy processing charge and the carbon copy receive-side charge when the owner is the partner in a carbon copy relationship defined by this trading partner.
Y	N	The owner of the trading partner list is willing to pay only the carbon copy processing charge when the owner is the partner in a carbon copy relationship defined by this trading partner.
N	Y	The owner of the trading partner list is willing to pay only the carbon copy receive-side charge when the owner is the partner in a carbon copy relationship defined by this trading partner.
N	N	The owner of the trading partner list is not willing to pay either charge when the owner is the partner in a carbon copy relationship defined by this trading partner.

Specifying carbon copy recipient payment levels
■ **As carbon copy recipient (Y/N):**
You can specify a user's willingness to pay charges when the user is a carbon copy recipient.

- Pay for processing?
This specifies the user's willingness to pay the carbon copy processing charge.

- Pay for receiving?
This specifies the user's willingness to pay the carbon copy receive-side charge.

The following combinations are valid for the carbon copy Processing (**P**) charge and the carbon copy Receive (**R**) charge.

P	R	The carbon copy recipient (CCR):
Y	Y	The owner of the trading partner list is willing to pay both the carbon copy processing charge and the carbon copy receive-side charge, when the owner is the recipient in a carbon copy relationship defined by this trading partner.
Y	N	The owner of the trading partner list is willing to pay only the carbon copy processing charge when the owner is the recipient in a carbon copy relationship defined by this trading partner.
N	Y	The owner of the trading partner list is willing to pay only the carbon copy receive-side charge when the owner is the recipient in a carbon copy relationship defined by this trading partner.
N	N	The owner of the trading partner list is not willing to pay either charge when the owner is the recipient in a carbon copy relationship defined by this trading partner.

Looking at a list of trading partners

If you want to view a list of trading partners, follow this path.

```
 M0000US          Information Exchange Administration Services
                              Main Menu
                            System ID : SY1

 Action 6      Work with one of the following:
                  1. Profiles
                  2. Alias tables
                  3. Distribution lists
                  4. Messages
                  5. Audit trails and session traces
                  6. Trading partners
                  7. Libraries
                  8. Events
```

Choose Action 6

```
 M1330US                 Work with Trading Partners

 Account ID.... ACCT1              (actions 1 - 9)
 User ID....... USER2              (actions 1 - 9)
 Specify partner:                  (actions 2 - 7)
   User........ ___ _____ _____  or
   Alias....... _ ___ _____

 Action........ 1    1. List trading partners
                     2. Add a trading partner
                     3. Browse a trading partner
                     4. Change a trading partner
                     5. Delete a trading partner
```

Fill in the account ID and user ID of the list owner here

Choose Action 1

```
 M1331US              List Trading Partners

 Account ID / user ID  ACCT1     / USER2

 Start at Sys, Account, and User ID  ___ _____ _____ (press Enter)

 Codes (multiple selection):
  B = Browse    C = Change    D = Delete    O = Copy

        --- Partner User ----    ---- Partner Alias ----- ---- Pay charges? ----
 Code  Sys Account   User ID    Typ Tbl Name             Send   Receive CCP   CCR
                                                         S R B  S R B  P R  P R
  B        ACCT1     USER1       G   TB5 ALIAS5           Y N N  N N N  Y N  N Y
  C        ACCT1     USER5       G   TB6 ALIAS6           Y N N  N N N  Y N  N Y
  D        ACCT1     USER3       O   TB7 ALIAS7           Y Y N  N Y N  Y N  N Y
  O        ACCT1     USER6                                Y Y N  Y Y N  Y N  N Y




 Command ===>
 Enter  F1=Help  F2=Add Partner  F3=Exit  F4=Main Menu  F12=Cancel
```

The List Trading Partners panel displays

You can perform any of these functions from this list

The "Start at" and "Code" fields are the only fields that can be changed on this panel. All other fields are protected and cannot be changed. To begin the list with a specific trading partner, enter the trading partner's system ID (if on another system), account ID, and user ID, in the "Start at Sys, Account, and User ID" field.

You can select more than one task on this panel. When you press F2 or Enter, your choices are processed in the order they display. Deletions process last and only when you press F3.

If you select to browse a trading partner's information, you see a panel like this one.

The Browse a Trading
Partner panel displays

```
M1332US                     Browse a Trading Partners

Account ID / user ID  ACCT1    / USER2

Partner:
  User..............     ACCT1    USER1    or
  Alias............. G TB5 ALIAS5

As sender (Y/N):
  Pay for sending?... Y   Pay for receiving?... N   Block communication?... N
As receiver (Y/N):
  Pay for sending?... N   Pay for receiving?... N   Block communication?... N
As carbon copy partner (Y/N):
  Pay for processing?............. Y    Pay for receiving?............... N
As carbon copy recipient (Y/N):
  Pay for processing?............. N    Pay for receiving?............... Y
Require partner to be ESO? (Y/N)... Y

Last changed on............ 02/05/99   Last changed by  ACCT1    - USER2
```

If you select to change a trading partner's information, you see a panel like this one.

The Change a Trading
Partner panel displays

```
M1332US                     Change a Trading Partner

Account ID / user ID. ACCT1    / USER2

Partner:
  User..............     ACCT1    USER5    or
  Alias............. G TB6 ALIAS6

As sender (Y/N):
  Pay for sending?... Y   Pay for receiving?... N   Block communication?... N
As receiver (Y/N):
  Pay for sending?... N   Pay for receiving?... N   Block communication?... N
As carbon copy partner (Y/N):
  Pay for processing?............. Y    Pay for receiving?............... N
As carbon copy recipient (Y/N):
  Pay for processing?............. N    Pay for receiving?............... Y
Require partner to be ESO? (Y/N)... Y

Last changed on............ 02/05/99   Last changed by  ACCT1    - USER2
```

If you select to delete a trading partner's information, you see a panel like this one.

The Delete a Trading
Partner List panel displays

```
M1335US                 Delete a Trading Partner

   Account ID........ ACCT1
   User ID.......... USER2
   Partner:
     User...........     ACCT1    USER3
     Alias.......... O TB7 ALIAS7


   Do you want to delete this trading partner? (Y/N)... _
```

NOTE: Information Exchange Administration Services processes
selections other than deletes in the order they appear on the list. Deletes are
processed last, and when you press F3.

If you select to copy a trading partner's information to another trading partner, you see a panel
like this one.

The Copy a Trading
Partner panel displays

```
M1332US                 Copy a Trading Partner

Account ID / user ID. ACCT1    / USER2

Specify partner:
  User.............. ___ _____ _____  or
  Alias............. _ ___ _____

As sender (Y/N):
  Pay for sending?... Y   Pay for receiving?... Y   Block communication?... N
As receiver (Y/N):
  Pay for sending?... Y   Pay for receiving?... Y   Block communication?... N
As carbon copy partner (Y/N):
  Pay for processing?............. Y    Pay for receiving?............... N
As carbon copy recipient (Y/N):
  Pay for processing?............. N    Pay for receiving?............... Y
Require partner to be ESO? (Y/N)... Y
```

Adding trading partner information

You can identify trading partners in one of two ways:

■ By the trading partner's Information Exchange address, in the form of a system ID (optional), account ID, and user ID.

■ By the trading partner's alias.
If the alias resolves to a user on your local Information Exchange system, it must be an alias in an alias table you can access.

NOTE: If the alias resolves to a user who is not on your local system, Information Exchange does not validate the alias.

To add trading partner information to a trading partner list, press F2 on the List Trading Partners panel or follow this path.

Fill in the account ID and user ID of the list owner

Fill in the account ID and user ID, or alias of the trading partner you want to add

Choose Action 2

```
M1330US                    Work with Trading Partners

Account ID.... ACCT1              (actions 1 - 9)
User ID....... USER2              (actions 1 - 9)
Specify partner:                  (actions 2 - 7)
  User........ ___ _____ _____   or
  Alias....... _ ___ _____

Action........ 2   1. List trading partners
                   2. Add a trading partner
                   3. Browse a trading partner
                   4. Change a trading partner
                   5. Delete a trading partner
```

You see a panel like this one.

The account ID and user ID you are working with are filled in here.

If you reach this panel by pressing F2, the "partner" fields are blank.

Fill in the payment levels and ESO option

```
M1332US                    Add a Trading Partner

Account ID / user ID. ACCT1    / USER2

Partner:
  User..............   ACCT1    USER4    or
  Alias.............

As sender (Y/N):
  Pay for sending?... Y  Pay for receiving?... N  Block communication?... N
As receiver (Y/N):
  Pay for sending?... N  Pay for receiving?... N  Block communication?... N
As carbon copy partner (Y/N):
  Pay for processing?............. Y    Pay for receiving?............... N
As carbon copy recipient (Y/N):
  Pay for processing?............. Y    Pay for receiving?............... Y
Require partner to be ESO? (Y/N)... N




Command ===>
Enter  F1=Help  F2=Save and continue F3=Exit  F4=Main Menu  F12=Cancel
```

When you add trading partner information, this panel displays with the payment level information from the user profile of the owner of the trading partner list. You can type over the information with the new information you want for the new trading partner.

When you are finished adding a trading partner's information, you can save the information in one of the following ways:

■   Press F2 to save the information and add another trading partner.

■   Press F3 to save the information and return to the Work with Trading Partners menu.

■   Press F4 to save the information and return to the Main Menu.

NOTE: You can add up to 9,999 users to the list. If you want to add more than 9,999 users, you must save the list, choose to change the trading partner list, and then add more users.

Browsing trading partner information

You can browse (view) each trading partner's individual information directly from the List Trading Partners panel or you can follow this path.

Fill in the account ID and
user ID of the list owner

Fill in the account ID and
user ID, or alias, of the
trading partner you want
to browse

Choose Action 3

```
M1330US                    Work with Trading Partners

Account ID.... ACCT1                (actions 1 - 9)
User ID....... USER2                (actions 1 - 9)
Specify partner:                    (actions 2 - 7)
  User........ ___ _____ _____  or
  Alias....... _ ___ _____

Action........ 3   1. List trading partners
                   2. Add a trading partner
                   3. Browse a trading partner
                   4. Change a trading partner
                   5. Delete a trading partner
```

You see a panel like this one.

The Browse a Trading
Partner panel displays

The trading partner
account ID and user
ID display here

```
M1332US                 Browse a Trading Partner

Account ID / user ID. ACCT1    / USER2

Partner:
  User..............    ACCT1    USER1   or
  Alias............. G TB5 ALIAS5

As sender (Y/N):
  Pay for sending?... Y   Pay for receiving?... N   Block communication?... N
As receiver (Y/N):
  Pay for sending?... N   Pay for receiving?... N   Block communication?... N
As carbon copy partner (Y/N):
  Pay for processing?............. Y    Pay for receiving?................ N
As carbon copy recipient (Y/N):
  Pay for processing?............. N    Pay for receiving?................ Y
Require partner to be ESO? (Y/N)... Y

Last changed on............ 02/05/99   Last changed by  ACCT1    - USER2
```

When you are finished browsing the information, press F3.

Changing trading partner information

You can change information about a trading partner directly from the List Trading Partners panel, or you can follow this path.

Fill in the account ID and user ID of the list owner

Fill in the account ID and user ID, or alias, of the trading partner whose information you want to change

Choose Action 4

```
M1330US                    Work with Trading Partners

Account ID.... ACCT1                (actions 1 - 9)
User ID....... USER2                (actions 1 - 9)
Specify partner:                    (actions 2 - 7)
  User........ ___  ACCT1    USER5   or
  Alias....... _ ___ _____

Action........ 4    1. List trading partners
                    2. Add a trading partner
                    3. Browse a trading partner
                    4. Change a trading partner
                    5. Delete a trading partner
```

You see a panel like this one.

The Change a Trading Partner panel displays

The trading partner account ID and user ID display here

```
M1332US                 Change a Trading Partner

Account ID / user ID. ACCT1    / USER2

Partner:
  User..............    ACCT1    USER5    or
  Alias............. G TB6 ALIAS6

As sender (Y/N):
  Pay for sending?... Y   Pay for receiving?... N   Block communication?... N
As receiver (Y/N):
  Pay for sending?... N   Pay for receiving?... N   Block communication?... N
As carbon copy partner (Y/N):
  Pay for processing?............. Y    Pay for receiving?................ N
As carbon copy recipient (Y/N):
  Pay for processing?............. N    Pay for receiving?............... Y
Require partner to be ESO? (Y/N)... Y

Last changed on............ 02/05/99    Last changed by ACCT1    - USER2
```

Type the changes you want on this panel and press F3 to save the information.

Deleting trading partner information

You can delete information about a trading partner directly from the List Trading Partners panel, or you can follow this path.

Fill in the account ID and user ID of the list owner

Fill in the account ID, user ID, or alias, of the trading partner whose information you want to delete

Choose Action 5

```
 M1330US                      Work with Trading Partners

 Account ID.... ACCT1                  (actions 1 - 9)
 User ID....... USER2                  (actions 1 - 9)
 Specify partner:                      (actions 2 - 7)
   User........ ___  ACCT1    USER3    or
   Alias....... _ ___ _____

 Action........ 5    1. List trading partners
                     2. Add a trading partner
                     3. Browse a trading partner
                     4. Change a trading partner
                     5. Delete a trading partner
                     6. Copy a trading partner
```

You see a panel like this one.

Fill in Y and press F3

```
 M1335US                  Delete a Trading Partner

   Account ID........  ACCT1
   User ID..........  USER2
   Partner:
     User...........      ACCT1    USER3
     Alias..........

 Do you want to delete this trading partner? (Y/N)... Y
```

On this panel, you are asked to confirm that you want to delete this trading partner's information from the trading partner list.

For more information, see "Confirming deletions" on page 27.

Copying trading partner information

When you need the same trading partner information for two different trading partners, you can copy the information from one trading partner to another. You can copy information about a trading partner directly from the List Trading Partners panel, or you can follow this path.

Fill in the account ID and user ID of the list owner

Fill in the account ID and user ID of the trading partner you want to copy

Choose Action 6

```
M1330US                    Work with Trading Partners

Account ID.... ACCT1                 (actions 1 - 9)
User ID....... USER2                 (actions 1 - 9)
Specify partner:                     (actions 2 - 7)
  User........ ___  ACCT1   USER5    or
  Alias....... _ ___ _____

Action........ 6    1. List trading partners
                    2. Add a trading partner
                    3. Browse a trading partner
                    4. Change a trading partner
                    5. Delete a trading partner
                    6. Copy a trading partner
```

You see a panel like this one.

The Copy a Trading Partner panel displays

Fill in the new account ID and user ID, or alias, information here

```
M1332US                     Copy a Trading Partner

Account ID / user ID. ACCT1    / USER2

Specify partner:
  User.............. ___ _____ _____ or
  Alias............. _ ___ _____

As sender (Y/N):
  Pay for sending?... Y   Pay for receiving?... Y   Block communication?... N
As receiver (Y/N):
  Pay for sending?... N   Pay for receiving?... Y   Block communication?... N
As carbon copy partner (Y/N):
  Pay for processing?............. Y    Pay for receiving?................ Y
As carbon copy recipient (Y/N):
  Pay for processing?............. Y    Pay for receiving?................ Y
Require partner to be ESO? (Y/N)... Y
```

To copy the information to another trading partner, type the account ID and user ID of the new trading partner and press F3.

Copying another user's trading partner list

To create a trading partner list by copying another user's trading partner list, follow this path.

Fill in the account ID and user ID of the user who wants the copy

Fill in the account ID and user ID of the user whose list you want to copy

Choose Action 7

```
M1330US                     Work with Trading Partners

Account ID.... ACCT1                (actions 1 - 9)
User ID....... USER2                (actions 1 - 9)
Specify partner:                    (actions 2 - 7)
  User........ ___ ACCT1    USER5   or
  Alias....... _ ___ _____

Action........ 7    1. List trading partners
                    2. Add a trading partner
                    3. Browse a trading partner
                    4. Change a trading partner
                    5. Delete a trading partner
                    6. Copy a trading partner
                    7. Copy another user's trading partner list
```

You see a panel like this one.

This is the user who wants a copy of the list

This is the user whose list you want to copy

Confirm the copy here

This message only displays if the destination user ID already has a trading partner list

```
M1337US          Copy Another User's Trading Partner List

Destination trading partner list:
  Account ID / user ID.... ACCT1    / USER2

Source trading partner list:
  Account ID / user ID.... ACCT1    / USER5

Do you want to copy from the source trading partner list
to the destination trading partner list? (Y/N) Y

  NOTE: The destination ID already has a trading partner list.
        If you choose to copy, the source list will be merged into
        the destination list. If duplicate entries are found, the
        entry in the destination list will remain unchanged.




Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

Type **y** and press F3 to confirm the copy. To cancel this request, type **n** or press F12.

Copying a distribution list to a trading partner list

If you want to copy a distribution list to a list of trading partners, follow this path.

Fill in the account ID
and user ID of
the user who
wants the copy

```
M1330US                    Work with Trading Partners

Account ID.... ACCT1               (actions 1 - 9)
User ID....... USER2               (actions 1 - 9)
Specify partner:                   (actions 2 - 7)
  User........ ___ _____ _____     or
  Alias....... _ ___ _____

Action........ 8    1. List trading partners
                    2. Add a trading partner
                    3. Browse a trading partner
                    4. Change a trading partner
                    5. Delete a trading partner
                    6. Copy a trading partner
                    7. Copy another user's trading partner list
                    8. Copy a distribution list to a trading partner list
                    9. Delete trading partner list
                   10. Work with carbon copy relationships
```

Choose Action 8

You see a panel like this one.

Fill in the owner of the
distribution list that
you want to copy

Fill in the distribution
list name and the list
type

This is the user who
wants the copy

Fill in the payment
levels and ESO option

```
M2500US      Copy a Distribution List to a Trading Partner List

Source distribution list:
  Account ID / user ID.........  ACCT1   / USER5
  List type / list name........  A / DISTLST5

Destination trading partner list:
  Account ID / user ID.........  ACCT1    / USER2

  As sender (Y/N):
    Pay for sending?.. Y   Pay for receiving?.. N   Block communication?.. N
  As receiver (Y/N):
    Pay for sending?.. N   Pay for receiving?.. N   Block communication?.. N
  As carbon copy partner (Y/N):
    Pay for processing?............ Y    Pay for receiving?............. N
  As carbon copy recipient (Y/N):
    Pay for processing?............ N    Pay for receiving?............. Y
  Require partner to be ESO? (Y/N).. Y


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

When you copy a distribution list to a trading partner list, the payment level information you specify on this panel applies to each entry in the new trading partner list.

NOTE: If the user already has a list of trading partners, Information Exchange Administration Services prevents duplicate entries by merging the two lists and taking the entry values from the original trading partner list.

When you are finished making changes, press F3 to save the information.

Deleting a trading partner list

If you want to delete a list of trading partners, follow this path.

Fill in the account ID and user ID of the list owner

```
M1330US                  Work with Trading Partners

Account ID.... ACCT1                 (actions 1 - 9)
User ID....... USER2                 (actions 1 - 9)
Specify partner:                     (actions 2 - 7)
  User....... ___ _____ _____  or
  Alias....... _ ___ _____

Action........ 9    1. List trading partners
                    2. Add a trading partner
                    3. Browse a trading partner
                    4. Change a trading partner
                    5. Delete a trading partner
                    6. Copy a trading partner
                    7. Copy another user's trading partner list
                    8. Copy a distribution list to a trading partner list
                    9. Delete trading partner list
                   10. Work with carbon copy relationships
```

Choose Action 9

You see a panel like this one.

The Delete a Trading Partner List panel displays

```
M1338US              Delete Trading Partner List

   Account ID........  ACCT1
   User ID...........  USER2

Do you want to delete this user's list of trading partners? (Y/N)... Y
```

Fill in Y and press F3 to delete

On this panel, you are asked to confirm that you want to delete a user's trading partner list.

For more information, see "Confirming deletions" on page 27.

Special considerations for cluster user IDs

A parent user ID can own a trading partner list and can be an entry in a trading partner list. This is not true for child user IDs. When using trading partner functions for cluster users, the user ID must be a cluster parent user ID.

Working with user groups

You can use *user groups* to manage communications between a set of users who are in the same account.

For example, if all of your users are in one account, but their day-to-day work is organized into various projects, you may want to set up user groups so that users within a project can communicate with one another and with certain people outside the project, but not with all the users in the account.

If you decide to use user groups to define how users communicate, be sure the "Allow unrestricted communication within account" field is set to **n** in the account profile. If this field is set to **y**, all users within the account can exchange mail without restriction, regardless of how your user groups are set up.

This chapter covers the following:

Understanding user groups

User groups are a way of dividing users within an account into smaller, more manageable groups. You can have up to 80 user groups in one account.

A particular user can be in more than one group at a time. For example, project managers can be in user groups made up of the people in those projects and can also be in a user group made up of all the project managers in that part of the company.

For user groups to affect communications between users in the same account, the "Allow unrestricted communications" field must be set to n in the account profile. For more information, see "Determining if users can communicate within accounts" on page 101.

How user groups affect communications

To allow users within a user group to communicate with another group, you must:

■ Put the users into two user groups
■ Make the two groups intersect with each other

Only users in intersecting groups can communicate with one another. For users in the same group to exchange mail, you make the group intersect with itself.

Here is an example of how you could set up three user groups.

Notice that:

■ Project managers can exchange mail with other project managers.

■ Users within a project can exchange mail with their own project manager and with one another, but not with users in another project.
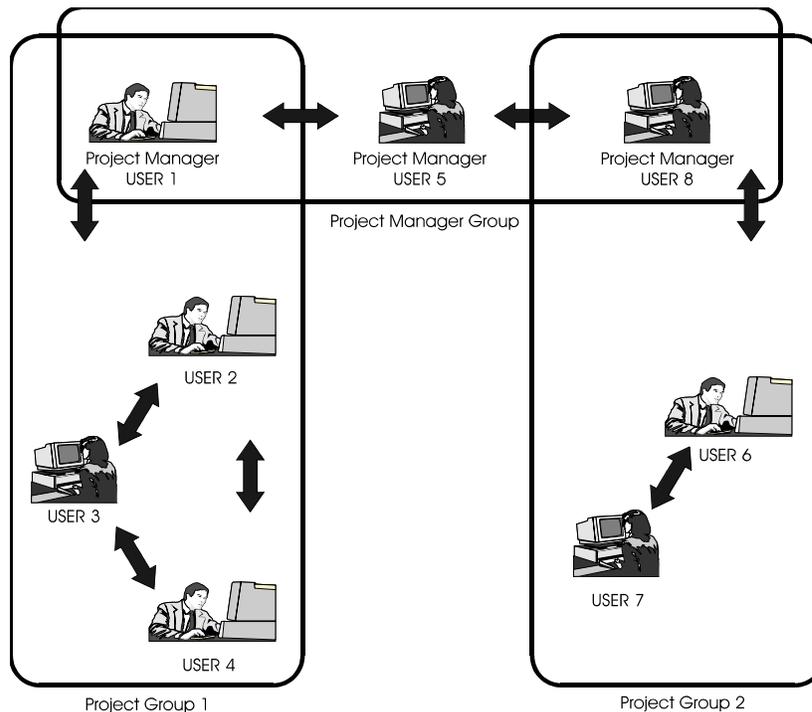
Determining if users can communicate within accounts

When you try to send a message to a trading partner within your account, Information Exchange checks the sender's and receiver's trading partner list. If the trading partner is in the list, Information Exchange uses the payment-level information in the list to assign the charges. If not, Information Exchange asks these questions in this order:

1. Is unrestricted communication permitted between user IDs within your account?

2. Are you and the receiver in user groups that intersect?

3. Is communication permitted based on the user profile?

If the answer to a question is No, Information Exchange goes to the next question. As soon as the answer to one of the questions is Yes, Information Exchange delivers the message.

If the answer to all questions is No, the message is not delivered.

When you set up your account for communications, you must first decide how you want users to communicate, both between accounts and within a single account, including how payment levels are set up.

For communication outside your account, first set up your users' profiles with the necessary payment levels.

If you want to set up custom payment levels for various users, set up trading partner lists as well.

Adding a new user group

Before you begin setting up user groups, you should think about how you want the users you manage to communicate with one another.
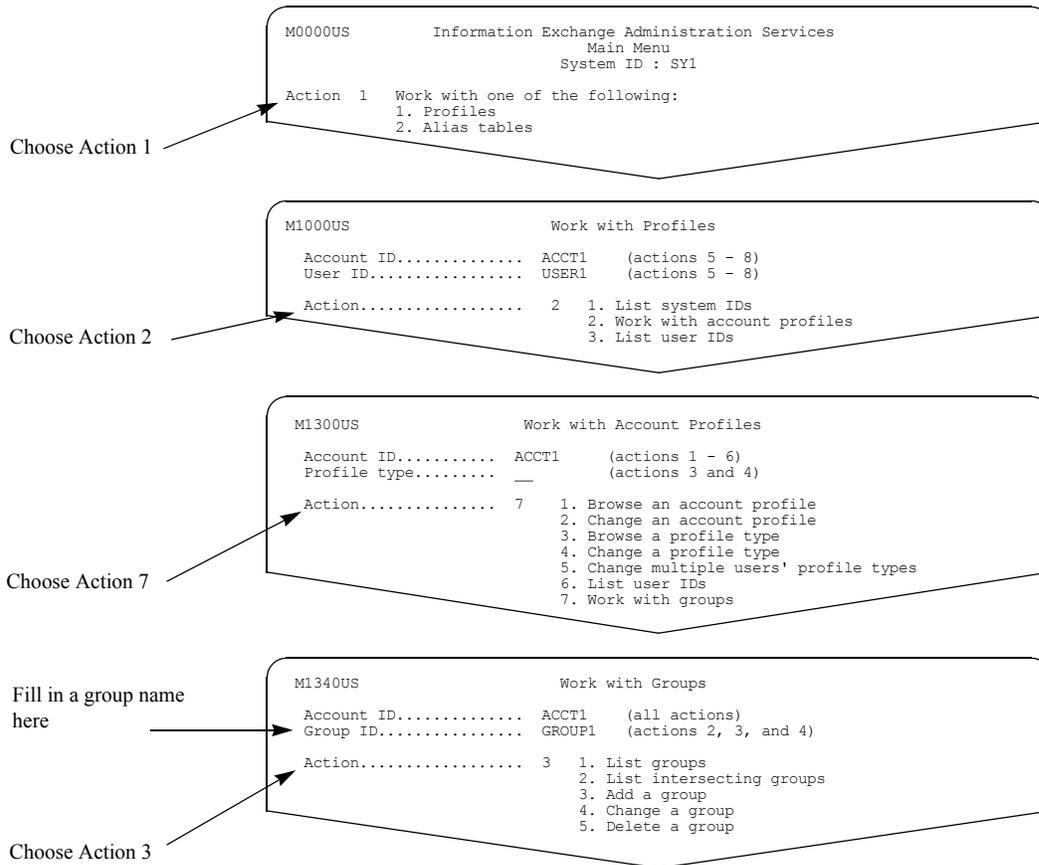
Make a list of the different user groups you will need and the names you want to use for each group. In Information Exchange Administration Services, the group's name can be up to eight characters long. You can use any alphanumeric character, plus the national characters **@**, **#**, or **$**. You can have up to 80 groups in an account.

Next, make a list of the users you want to put in each group. A particular user can be in more than one user group.

NOTE: When dealing with cluster user IDs, a child user ID cannot be a member of a group. You must use the parent user ID.

When you are ready to create a new user group, follow this path.

```
M0000US        Information Exchange Administration Services
                              Main Menu
                          System ID : SY1

Action  1   Work with one of the following:
              1. Profiles
              2. Alias tables
```

Choose Action 1

```
M1000US                    Work with Profiles

   Account ID.............  ACCT1    (actions 5 - 8)
   User ID................  USER1    (actions 5 - 8)

   Action.................   2   1. List system IDs
                                 2. Work with account profiles
                                 3. List user IDs
```

Choose Action 2

```
M1300US                 Work with Account Profiles

   Account ID..........  ACCT1    (actions 1 - 6)
   Profile type.........  __       (actions 3 and 4)

   Action..............  7    1. Browse an account profile
                              2. Change an account profile
                              3. Browse a profile type
                              4. Change a profile type
                              5. Change multiple users' profile types
                              6. List user IDs
                              7. Work with groups
```

Choose Action 7

Fill in a group name here

```
M1340US                    Work with Groups

   Account ID.............  ACCT1    (all actions)
   Group ID...............  GROUP1   (actions 2, 3, and 4)

   Action.................  3   1. List groups
                                2. List intersecting groups
                                3. Add a group
                                4. Change a group
                                5. Delete a group
```

Choose Action 3

You see a panel like this one.

```
M1342US                         Add a Group

    Account ID..............  ACCT1
    Group ID...............   GROUP1

    User ID         User ID         User ID         User ID         User ID
    USER1           USER2           USER3           USER4           USER5
    USER6           USER7           USER8           USER9           USER10
    USER11          USER12          USER13          USER14          USER15
    USER16          USER17          USER18          USER19          USER20
    USER21          USER22          USER23          USER24          USER25
    USER26          USER27          USER28          USER29          USER30
    USER31          USER32          USER33          USER34          USER35
    USER36          USER37          USER38          USER39          USER40
    USER41          USER42          USER43          USER44          USER45
    _____        _____        _____        _____        _____



    Command ===>
    Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward  F8=Forward  F12=Cancel
```

Fill in the ID of each user you want to include in the group

If you change your mind or make a mistake, just space over the user's ID

Fill in the blanks with the user ID of each user you want to include in the group.

If you change your mind about including a particular user, just space over the user's ID.

NOTE: If you want the users in this group to communicate with one another or with users in other groups, you must define intersections for the group.

For information on setting up intersections, see "Setting up and maintaining group intersections" on page 107.

Changing a user group

You can change a user group by adding users to the group or deleting users from the group.

Follow this path:

```
M1000US                    Work with Profiles

  Account ID.............. ACCT1    (actions 5 - 8)
  User ID................. USER1    (actions 5 - 8)

  Action.................  2    1. List system IDs
                                2. Work with account profiles
                                3. List user IDs
```

Choose Action 2

```
M1300US                 Work with Account Profiles

  Account ID.......... ACCT1    (actions 1 - 6)
  Profile type........ __       (actions 3 and 4)

  Action..............  7    1. Browse an account profile
                             2. Change an account profile
                             3. Browse a profile type
                             4. Change a profile type
                             5. Change multiple users' profile types
                             6. List user IDs
                             7. Work with groups
```

Choose Action 7

```
M1340US                    Work with Groups

  Account ID............. ACCT1    (all actions)
  Group ID............... _____  (actions 2, 3, and 4)

  Action................  1    1. List groups
                               2. List intersecting groups
                               3. Add a group
                               4. Change a group
                               5. Delete a group
```

Choose Action 1

You see a panel like this one.

```
M1341US                     List Groups

  Account ID............. ACCT1

  Codes (multiple selection):

    D = Delete group     I = List intersecting groups     C = Change groups

    C GROUP1      _ GROUP2      _ GROUP3      _ GROUP4      _ GROUP5
    _ GROUP6      _ GROUP7      C GROUP8      _ GROUP9      _ GROUP10
    C GROUP11     _ GROUP12     _ GROUP13     _ GROUP14     _ GROUP15
    _ GROUP16     C GROUP17     _ GROUP18     _ GROUP19     _ GROUP20
    _ GROUP21     _ GROUP22     _ GROUP23     _ GROUP24     _ GROUP25
    C GROUP26     _ GROUP27     _ GROUP28     _ GROUP29     _ GROUP30
    _ GROUP31     _ GROUP32     _ GROUP33     _ GROUP34     _ GROUP35
```

Fill in C next to each group you want to change

You also see a panel like this one.

```
M1344US                    Change a Group

  Account ID............. ACCT1
  Group ID............... GROUP1

  Codes (multiple selection):
    A = Add user ID     D = Delete user ID

    _ USER1       _ USER2       _ USER3       _ USER4       _ USER5
    D USER6       _ USER7       _ USER8       _ USER9       _ USER10
    _ USER11      D USER12      _ USER13      _ USER14      _ USER15
    _ USER16      _ USER17      _ USER18      _ USER19      _ USER20
    A USER21      A USER22      _ USER23      _ USER24      _ USER25
```

Fill in D next to each user you want to delete

Fill in A and the ID of each user you want to add

You add a user by filling in a blank line with an **a** and the user's user ID.

You can also type over an existing entry. The original entry is not lost, and the new one is added at the bottom of the list. You might want to do this if your list is very long and you just want to add one or two users. To delete a user, find the user you want to delete and type **d** next to the user ID.

You can add or delete as many users as you want.

When you finish making changes, press F3 or F4 to save your changes and leave the panel.

NOTE: A cluster parent user ID can be a member of a group and, as a result, the associated child user IDs are also members of the same group. Individual child user IDs cannot be members of a group, unless with their associated parent user ID.

Adding or deleting a user from multiple groups

If you want to find out all the groups a user belongs to, or if you want to add or delete a user from multiple groups at once, you can work from a list of all the groups in the account.

Follow this path.

```
M1000US                    Work with Profiles

  Account ID..............  ACCT1    (actions 5 - 8)
  User ID.................  USER1    (actions 5 - 8)

  Action.................  3    1. List system IDs
                                2. Work with account profiles
                                3. List user IDs
```

Choose Action 3

Fill in S next to each user you want to work with

```
M1200US                       List User IDs

  Account ID..............  ACCT1

  Start at User ID........  _____   (press Enter)

  Code (multiple selection):
    S = Select user
  s USER1     S USER2     _ USER3     _ USER4     _ USER5     _ USER6
  _ USER7     _ USER8     _ USER9     _ USER10    _ USER11    _ USER12
  s USER13    _ USER14    _ USER15    _ USER16    _ USER17    _ USER18
  _ USER19    _ USER20    _ USER21    _ USER22    _ USER23    _ USER24
```

```
M1400US                   Work with User Profiles

  Account ID..............  ACCT1    (actions 1 - 3, and 5)
  User ID.................  USER2    (actions 1, 2, and 5)
  Profile type............  __

  Action.................  5    1. Browse a user's profile
                                2. Change a user's profile
                                3. Change multiple users' profile types
                                4. Work with trading partners
                                5. Add and delete a user from groups
                                6. Work with event profiles
```

Choose Action 5

For cluster users, the user ID typed on the Work with User Profiles panel must be a parent user ID. Child user IDs cannot be members of a group. If the parent user ID is a member of a group, the child user IDs associated with the parent are members of the same group.

You see a panel like this one.

Y means the user is in the group and N means the user is not in the group

Fill in Y to include the user and N to exclude the user

```
M1430US              Add and Delete a User from Groups

  Account ID..............  ACCT1
  User ID.................  USER2

  Change N to Y to add the user to a group, Y to N to delete the user
   from a group.

  Y GROUP1     N GROUP2     Y GROUP3     N GROUP4     N GROUP5
  Y GROUP6     N GROUP7     Y GROUP8     N GROUP9     N GROUP10
  N GROUP11    Y GROUP12    Y GROUP13    Y GROUP14    Y GROUP15
  Y GROUP16    Y GROUP17    Y GROUP18    N GROUP19    Y GROUP20
  Y GROUP21    N GROUP22    N GROUP23    N GROUP24    Y GROUP25
  N GROUP26    N GROUP27    Y GROUP28    Y GROUP29    N GROUP30
  Y GROUP31    Y GROUP32    N GROUP33    N GROUP34    Y GROUP35
  N GROUP36    Y GROUP37    Y GROUP38    Y GROUP39    N GROUP40
  Y GROUP41    N GROUP42    N GROUP43    N GROUP44    Y GROUP45
  N GROUP46    Y GROUP47    Y GROUP48    Y GROUP49    N GROUP50


  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward  F8=Forward  F12=Cancel
```

The groups the user is currently assigned to are marked with Y.

Fill in **y** to add the user to a group or **n** to delete the user from a group.

Setting up and maintaining group intersections

A user group can intersect with:

■ Another group--to enable communication between the two groups
■ Itself--so that people within the group can exchange mail

You use intersections to control how users in user groups communicate with other groups and with one another.

For example, you may want each user within a group to be able to communicate with project managers, but not with any other member of the group. If so, you would make the user group intersect with the project manager group, but you would not make it intersect with itself.

Before you begin, it is a good idea to make a list of the user groups you manage and to map out the intersections you want to set up.

When you are ready, follow this path.

```
M1000US                    Work with Profiles

  Account ID.............  ACCT1    (actions 5 - 8)
  User ID................  USER1    (actions 5 - 8)

  Action.................  2    1. List system IDs
                                2. Work with account profiles
                                3. List user IDs
```

Choose Action 2

```
M1300US                    Work with Account Profiles

  Account ID...........  ACCT1    (actions 1 - 6)
  Profile type.........  __       (actions 3 and 4)

  Action..............  7    1. Browse an account profile
                             2. Change an account profile
                             3. Browse a profile type
                             4. Change a profile type
                             5. Change multiple users' profile types
                             6. List user IDs
                             7. Work with groups
```

Choose Action 7

```
M1340US                    Work with Groups

  Account ID.............  ACCT1    (all actions)
  Group ID...............  _____  (actions 2, 3, and 4)

  Action.................  1    1. List groups
                                2. List intersecting groups
                                3. Add a group
                                4. Change a group
                                5. Delete a group
```

Fill in the ID of the account for which you want to see the list

Choose Action 1

You see a panel like this one.

```
M1341US                         List Groups

  Account ID.............  ACCT2

  Codes (multiple selection):

   D = Delete group      I = List intersecting groups    C = Change groups


    I GROUP1      _ GROUP2      _ GROUP3      _ GROUP4      _ GROUP5
    _ GROUP6      _ GROUP7      I GROUP8      _ GROUP9      _ GROUP10
    I GROUP11     _ GROUP12     _ GROUP13     _ GROUP14     _ GROUP15
    _ GROUP16     I GROUP17     _ GROUP18     _ GROUP19     _ GROUP20
    _ GROUP21     _ GROUP22     _ GROUP23     _ GROUP24     _ GROUP25
    I GROUP26     _ GROUP27     _ GROUP28     _ GROUP29     _ GROUP30
    _ GROUP31     _ GROUP32     _ GROUP33     _ GROUP34     _ GROUP35
```

Fill in I next to each group for which you want to set up intersections

You see a panel like one.

The list shows all the
groups in the account

I means that the group
intersects with the group
listed at the top of the panel

```
M1343US                         List Intersecting Groups

   Account ID..............  ACCT2
   Group ID................  GROUP1

   Codes (multiple selection):
     I = Add to intersection      Blank = Remove from intersection

    I GROUP1       _ GROUP2       _ GROUP3       _ GROUP4       _ GROUP5
    _ GROUP6       _ GROUP7       I GROUP8       _ GROUP9       _ GROUP10
    I GROUP11      _ GROUP12      _ GROUP13      _ GROUP14      _ GROUP15
    _ GROUP16      _ GROUP17      _ GROUP18      _ GROUP19      _ GROUP20
    I GROUP21      _ GROUP22      _ GROUP23      _ GROUP24      _ GROUP25
    _ GROUP26      _ GROUP27      _ GROUP28      _ GROUP29      _ GROUP30
    _ GROUP31      _ GROUP32      _ GROUP33      _ GROUP34      _ GROUP35
```

NOTE: This panel shows all the user groups in the account you specified, including the user group you specified.

If any groups already intersect with the group you specified, you see an **I** next to the group ID.

To set up an intersection, type **i** next to the Group ID.

To make the group you are working with intersect with itself, type i next to its group ID.

To remove an intersection, space over the I.

Deleting a user group

Delete a user group if you no longer need to enable communications between a particular set of users. For example, if project group membership changes a lot, you might decide to delete some user groups and create new groups that reflect the new project assignments.

Deleting a user group removes the group and its intersections. Deleting the user group has no effect on the user IDs of the users who were in the group.

When you are ready, follow this path.

```
M1000US                      Work with Profiles

  Account ID.............  ACCT1    (actions 5 - 8)
  User ID................  USER1    (actions 5 - 8)

  Action.................  2    1. List system IDs
                                2. Work with account profiles
                                3. List user IDs
```

Choose Action 2

```
M1300US                  Work with Account Profiles

  Account ID...........  ACCT1    (actions 1 - 6)
  Profile type.........  __       (actions 3 and 4)

  Action..............   7    1. Browse an account profile
                              2. Change an account profile
                              3. Browse a profile type
                              4. Change a profile type
                              5. Change multiple users' profile types
                              6. List user IDs
                              7. Work with groups
```

Choose Action 7

```
M1340US                      Work with Groups

  Account ID.............  ACCT1    (all actions)
  Group ID...............  _____  (actions 2, 3, and 4)

  Action.................  1   1. List groups
                               2. List intersecting groups
                               3. Add a group
                               4. Change a group
                               5. Delete a group
```

Choose Action 1

You see a panel like this one.

Fill in D next to each group
you want to delete

```
M1341US                      List Groups

Account ID.............  ACCT1

Codes (multiple selection):

  D = Delete group      I = List intersecting groups    C = Change groups


  D GROUP1       _ GROUP2       _ GROUP3       _ GROUP4       _ GROUP5
  _ GROUP6       _ GROUP7       D GROUP8       _ GROUP9       _ GROUP10
  D GROUP11      _ GROUP12      _ GROUP13      _ GROUP14      _ GROUP15
  _ GROUP16      D GROUP17      _ GROUP18      _ GROUP19      _ GROUP20
  _ GROUP21      _ GROUP22      _ GROUP23      _ GROUP24      _ GROUP25
  D GROUP26      _ GROUP27      _ GROUP28      _ GROUP29      _ GROUP30
  _ GROUP31      _ GROUP32      _ GROUP33      _ GROUP34      _ GROUP35
```

Type **d** next to the group you want to delete. You can delete more than one group at a time.

NOTE: There is no confirmation panel for this delete request. When you press F3, all selected groups are deleted.

Working with alias tables

· ·

Alias tables are lists of names that can be substituted for users' account IDs and user IDs. With alias tables, it is easier to keep track of users, because you identify the users by the names you choose for them.

You choose the name for the alias table itself and for each user in the table. For example, you might organize several users from the payroll department in an alias table named PAY with the following users.

This alias:	Might substitute for:
MARIA	Account ID ACCT25 and User ID MSMITH
BRIAN	Account ID ACCT25 and User ID BJONES
CHRIS-TOPHER	Account ID ACCT40 and User ID DONALD

NOTE: You use alias tables to organize your users and give them easy-to-remember substitute names. When you want to send the same mail item to a group of people, use a *distribution list*. For information on distribution lists, see Chapter 10, "Working with distribution lists."

This chapter covers the following:

Understanding alias tables

Alias tables are identified by:

- A type, which identifies the users on a system who can use the alias table ("Table type")

- An owner, which can be an individual user or an account, depending on the type of table

  - If the table is a private table, the owner is identified by an account ID and user ID.

  - If the table is an organizational table, the owner is identified by an account ID only.

  - A global table has no owner associated with it.

- A 3-character name ("Table name")

In addition, alias tables have a code ("Authorization") that identifies who can make changes to the table and what types of changes they can make.

More on table types

There are three types of alias tables:

- *Global* alias tables (**G**) can be read by all users on the local system.
  Global alias tables have no owner ID associated with them.

  General users with the "Change alias? (Y/N)" field set to **y** in their user profile and service administrators can create global alias tables.

- *Organizational* alias tables (**O**) can be read by all users in an account.
  Organizational alias tables have an account ID defined as the owner.

  General users with the "Change alias? (Y/N)" field set to **y** in their user profile and service administrators can create organizational tables for their account.

- *Private* alias tables (**P**) can be read only by the user for whom they were created and are for that user's private use.

  Private alias tables have an account ID and a user ID defined as the owner.

  Only this user, the user's service administrator, or an alternate administrator for this user can create a private alias table.

  If you are requesting an action on a private alias table using a cluster user ID, it must be the parent user ID.

More on authorization

Each table has an authorization that identifies who can change the table and the aliases in it, and what types of changes they can make:

■   *Global* authorization (**G**)

> NOTE: Only global alias tables can have global authorization. Only network personnel can delete global tables with global authorization.

■   *Account* authorization (**A**)

■   *Private* authorization (**P**)

The "Change alias? (Y/N)" field in the user profile determines what kinds of changes a general user can make to an alias table. The system does not check this field to determine authority for service administrators or account alternate administrators.

These tables show the kinds of updates users can make on alias tables of different types, with different authorizations.

For global tables

	Service Administrator	General user with "Change alias" set to Y	General user with "Change alias" set to N
Global	Can change entries for the account.	Can change entries for their account.	Can change own entries.
Account	Can change entire table.	Can change entire table.	Has no update authority.
Private	Can change entire table if the owner.	Can change entire table if the owner.	Can change entire table if the owner.

For organizational tables

	Service Administrator	General user with "Change alias" set to Y	General user with "Change alias" set to N
Account	Can change entire table if administrator for the owning account.	Can change entire table if user is in the owning account.	Has no update authority.
Private	Can change entire table if the owner.	Can change entire table if the owner.	Can change entire table if the owner.

For private tables

	Service Administrator	General user with "Change alias" set to Y	General user with "Change alias" set to N
Account	Can change entire table if administrator for the owning account.	Can change entire table if user is in the owning account.	Has no update authority.
Private	Can change entire table if the owner.	Can change entire table if the owner.	Can change entire table if the owner.

Including aliases in a table

Each entry within an alias table has an alias reference, which you can think of as the name. An alias reference can have up to 16 characters and must be unique within the alias table. Each entry also identifies the user for whom the alias reference is substituting. An alias reference can substitute for:

■ An account ID and user ID

If the user is on another system, the system ID is also included.

■ Another alias (as specified in an alias table to which you have read access)

■ An entire alias table

You include the name of the alias table only. Information Exchange Administration Services treats this reference to the alias table as if you had specifically included every alias in that table in your new alias table.

You can include only one reference to an entire alias table in the new table.

Adding a new alias table

First, plan how you want to set up the new alias table. If you are unsure what type of table you want to create, or what update authorization you want to give it, see "Understanding alias tables" on page 113.

Next, decide what users you want to put into the alias table and what aliases to give them.

NOTE: If you are adding an alias table for a cluster user ID, it must be for the parent user ID.

When you are ready to set up your new alias table, follow this path.

Choose Action 2

```
M0000US          Information Exchange Administration Services
                              Main Menu
                          System ID : SY1

 Action 2   Work with one of the following:
               1. Profiles
               2. Alias tables
               3. Distribution lists
               4. Messages
```

Fill in these fields to identify the new alias table

The system ignores the user ID for "Table type" O

Choose Action 2

```
M2000US                       Work with Alias Tables

  Account ID.............  ACCT1    (all actions, table type O or P)
  User ID................  USER1    (all actions, table type P)
  Table type (G/O/P)......  O        (all actions)
  Table name.............  TB1      (actions 2, 3, 4, 5, or 6)
  Authorization (G/A/P)...  A        (action 2)

  Action.................  2    1. List alias tables
                                2. Add an alias table
                                3. Browse an alias table
                                4. Change an alias table
                                5. Delete an alias table
                                6. Retrieve an alias table
```

Fill in the fields.

- The "Account ID" field identifies the owner of an organizational alias table. For a private alias table, the "Account ID" and "User ID" fields together identify the owner.

- If you are unsure of what code to use for "Table type," see "More on table types" on page 113.

- If you are unsure of what code to use for "Authorization," see "More on authorization" on page 114.

NOTE: The system ignores the account ID and user ID for table type **G**, and it ignores the user ID for table type **O**.

When you are ready, press Enter.

You see a panel like this one.

Fill in the alias (up to
sixteen characters) and
either the user's ID or a
reference to another alias

You can include a single
reference to an entire alias
table to get access to all the
aliases on the table

```
M2100US                    Add an Alias Table

  Table name..............  TB1
  Table type..............  O

                   -- Alias Definition --- or ----- Alias Reference -----
  Alias name      Sys ID  Account  User ID  Typ  Tbl   Name
  ALIAS1            ___    ACCT1    USER2
                                            O    TB1   ALIAS16
  ALIAS2            ___                      G    TBG
  _____  ___    _____ _____ _    __   _____
  _____  ___    _____ _____ _    __   _____
  _____  ___    _____ _____ _    __   _____
  _____  ___    _____ _____ _    __   _____
  _____  ___    _____ _____ _    __   _____
  _____  ___    _____ _____ _    __   _____
  _____  ___    _____ _____ _    __   _____


  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward  F8=Forward  F12=Cancel
```

On each line, you can fill in one of the following:

■   An account ID and user ID

    If the user is on another system, you must also include the 3-character system ID.

■   An alias from an alias table that you have access to, by filling in the user's alias in the other
    table and the "Table type" and "Table name" of the other alias table.

■   The name of an alias table you have access to, by filling in the "Table type" and "Table
    name" of the other alias table.

    Including a reference to an entire alias table makes all the aliases in that table available to
    you, so that you do not have to fill in each alias separately.

    You may have only one reference to an entire alias table in each of your alias tables.

If you are unsure of what code to use for "Table type," see "More on table types" on page 113.

Browsing aliases in a table

If you want to just look through an alias table without making any changes, follow this path.

```
M2000US                      Work with Alias Tables

 Account ID.............  ACCT1    (all actions, table type O or P)
 User ID................  USER1    (all actions, table type P)
 Table type (G/O/P)......  O       (all actions)
 Table name.............  TB1      (actions 2, 3, 4, 5, or 6)
 Authorization (G/A/P)...  A       (action 2)

 Action.................  1    1. List alias tables
                               2. Add an alias table
                               3. Browse an alias table
                               4. Change an alias table
                               5. Delete an alias table
                               6. Retrieve an alias table
```

Fill in this field

Choose Action 1

```
M2800US                     List Alias Tables

Account ID.............  ACCT1    (blank for Global)
User ID................  _____  (blank for Global and Organizational)
Table type.............  O

 Start at table name.....  ___ (press Enter)

Codes (multiple selection):
 B = Browse   C = Change   D = Delete   R = Retrieve

  B TB1-A    _ TB2-A    _ TB3-A    _ TB4-A    _ TB5-P    _ TB6-P    _ TB7-P
  B TB8-A    _ TB9-P
```

The list shows all the alias tables in this account

Fill in B next to each alias table you want to browse

This denotes the "Authorization"

This list shows all the organizational alias tables in the account and the authorization associated with each table.

Find the alias table you want to look through and type **b** next to it. You can choose to browse more than one alias table at a time.

When you are ready, press Enter.

You see a panel like this one for each alias table you selected.

```
M2900US                     Browse an Alias Table

 Table type / Table name.......  O / TB1

 Start at alias...............  _____       (press Enter)

 Locate sys, account, or user ID ___ _____ _____  (press Enter)

 Alias name        Sys    Account  User ID   Typ  Tbl  Name
 ALIAS1                   ACCT1    USER5     G    TB5  ALIAS6
 ALIAS2                   ACCT1    USER6
 ALIAS3                   ACCT1    USER7
 ALIAS4                                      O    TB7  ALIAS7
 ALIAS5                                      O    TB8  ALIAS8




 Command ===>
 Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward  F8=Forward  F12=Cancel
```

The aliases are listed in alphabetical order

Changing the aliases in a table

If you want to change the aliases in a table, follow this path.

```
M2000US                    Work with Alias Tables

Account ID.............  ACCT1   (all actions, table type O or P)
User ID................  USER1   (all actions, table type P)
Table type (G/O/P)......  O       (all actions)
Table name.............  TB1     (actions 2, 3, 4, 5, or 6)
Authorization (G/A/P)...  A       (action 2)

Action.................  1   1. List alias tables
                             2. Add an alias table
                             3. Browse an alias table
                             4. Change an alias table
                             5. Delete an alias table
                             6. Retrieve an alias table
```

Fill in this field ⟶

Choose Action 1 ⟶

```
M2800US                    List Alias Tables

Account ID.............  ACCT1    (blank for Global)
User ID................  _____ (blank for Global and Organizational)
Table type.............  O

Start at table name.....  ___  (press Enter)

Codes (multiple selection):
  B = Browse   C = Change   D = Delete   R = Retrieve

C TB1-A    _ TB2-A    _ TB3-A    _ TB4-A    _ TB5-P    _ TB6-P    _ TB7-P
C TB8-A    _ TB9-P
```

Fill in C next to each
alias you want to change ⟶

This list shows all the organizational alias tables in the account and the authorization associated with each table.

Find the alias table you want to change and type **c** next to it. You can choose to change as many tables as you want.

When you are ready, press Enter.

You see a panel like this one.

```
M2600US                       Change an Alias Table

  Table type.............  O
  Table name.............  TB1

  Start at alias.........  _____          (press Enter)
  Locate Sys, Account,
    or user ID...........  ___ _____ _____    (press Enter)
  Codes (multiple selection):
    A = Add      C = Change      D = Delete
                        - Alias Definition -- or ---- Alias References------
  Code Alias name       Sys Account  User ID   Typ Tbl   Name
    C  ALIAS1               ACCT1     USER5      _   ___  _____
       ALIAS2               ACCT1     USER6      _   ___  _____
    D  ALIAS3               ACCT1     USER7      _   ___  _____
       ALIAS4               _____  _____   O   TB7  ALIAS7
    A  ALIAS5               _____  _____   O   TB8  ALIAS8



  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward  F8=Forward  F12=Cancel
```

Fill in the code for the
type of change you
want to make, then fill
in the new information ⟶

For global alias tables, general users with the "Change alias? (Y/N)" field set to **n** in their profile see only the entries they have authority to change. To see the entire list of aliases, follow the instructions in the section "Browsing aliases in a table" on page 119.

NOTE: For cluster user IDs, an alias name cannot resolve to a child user ID. You must use the parent user ID.

You can work with alias tables as follows:

■   To add an alias, type **a** and the new information on a blank line.

■   To change an alias, type **c** and the new information.

   You can change as many aliases as you want; however, **you cannot change the alias name.**

■   To delete an alias, type **d** next to the alias to be deleted.

■   When finished, press F3 or F4 to save the changes.

Deleting an alias table

To delete an entire alias table, follow this path.

```
M2000US                        Work with Alias Tables

Account ID..............  ACCT1    (all actions, table type O or P)
User ID.................  USER1    (all actions, table type P)
Table type (G/O/P)......  O        (all actions)
Table name.............  TB1      (actions 2, 3, 4, 5, or 6)
Authorization (G/A/P)...  A        (action 2)

Action.................  1   1. List alias tables
                             2. Add an alias table
                             3. Browse an alias table
                             4. Change an alias table
                             5. Delete an alias table
                             6. Retrieve an alias table
```

Fill in this field ———►

Choose Action 1 ⟋

```
M2800US                   List Alias Tables

Account ID..............  ACCT1    (blank for Global)
User ID.................  _____ (blank for Global and Organizational)
Table type.............  O

Start at table name.....  ___ (press Enter)

Codes (multiple selection):
  B = Browse   C = Change   D = Delete   R = Retrieve

  D TB1-A   _ TB2-A    _ TB3-A    _ TB4-A    _ TB5-P    _ TB6-P    _ TB7-P
  D TB8-A   _ TB9-P
```

Fill in D next to each
alias you want to delete

This list shows all the organizational alias tables in the account and the authorization associated with each table.

Find the alias table you want to delete and type **d** next to it. You can delete as many tables as you want.

When you are ready to delete the alias tables, press F3. You see a panel like this one.

To delete the table, fill in
Y and press F3

```
M2200US                      Delete an Alias Table

  Table name.............  TB1
  Table type.............  O

  Do you want to delete this alias table? (Y/N)...  Y
```

NOTE: You cannot delete a global table with global authorization. Only network personnel can delete these tables.

For more information, see "Confirming deletions" on page 27.

Retrieving an alias table

You can retrieve an alias table into your own mailbox or into the mailbox of a user for whom you are an administrator. You may want to do this if you or someone in your account prefers to make changes to the table in an environment other than Information Exchange Administration Services. For example, you may want to use your favorite text editor.

If you retrieve an alias table into a cluster mailbox, you must designate a specific child user ID as the receiver.

After you follow the directions in this section, the table is sent to the mailbox you specify as an inbound message from *SYSTEM* ADMINGET.

You can use an Information Exchange interface program to receive the message into the environment where you want to work. You are billed for receive-side charges.

After the changes are made, use the Information Exchange interface program to send the updated list back to Information Exchange.

Follow this path.

```
M2000US                    Work with Alias Tables

     Account ID.............  ACCT1    (all actions, table type O or P)
     User ID................  USER1    (all actions, table type P)
     Table type (G/O/P)......  O       (all actions)
     Table name.............  TB1      (actions 2, 3, 4, 5, or 6)
     Authorization (G/A/P)...  A       (action 2)

     Action.................  1   1. List alias tables
                                  2. Add an alias table
                                  3. Browse an alias table
                                  4. Change an alias table
                                  5. Delete an alias table
                                  6. Retrieve an alias table
```

Fill in this field ⟶

Choose Action 1 ⟶

```
M2800US                 List Alias Tables

   Account ID.............  ACCT1    (blank for Global)
   User ID................  _____ (blank for Global and Organizational)
   Table type.............  O

 Start at table name..... ___ (press Enter)

 Codes (multiple selection):
  B = Browse   C = Change   D = Delete   R = Retrieve

  R TB1-A    _ TB2-A    _ TB3-A    _ TB4-A    _ TB5-P    _ TB6-P    _ TB7-P
  R TB8-A    _ TB9-P
```

Fill in R next to each alias you want to retrieve ⟶

This list shows all the organizational tables in the account and the authorization associated with each table.

Find the alias table you want to retrieve and type **r** next to it. You can retrieve as many tables as you want.

When you are ready, press Enter.

You see a panel like this one.

```
M2850US                    Retrieve an Alias Table

   Account ID / User ID...............  ACCT1    / USER1
   Owning account ID / User ID........  ACCT1    /
   Table type / Table name...........  O / TB1


   Receiver's information (fill in only one line)
     Account ID - User ID.............  _____ - _____
     Alias type - table - name........  _ - ___ - _____
   Message Name......................  _____
   Message Sequence..................  _____
   Delivery class (P/blank)...........
   Retention period (Max 180 )........  030
   Output format type (B/S)...........  B




   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

Fill in only one of these lines to identify the receiver

Use these fields to further identify the alias table when it is sent to your mailbox

Here are some tips on how to fill in this panel:

- Fill in one line under "Receiver's information" to identify the receiver.
  You can specify a user or an alias reference.

- You can use "Message name" and "Message sequence" to further identify the message.

- For "Delivery class," use one of the following:

  - For high priority delivery, type **p**
  - For normal delivery, leave the field blank

- For "Retention period," type the number of days you want the message retained in the Information Exchange mailbox.

  The number must be between **1** and the maximum displayed by the system. The message is deleted if it is still in the mailbox after the retention period.

- For "Output format type," type **b** for Expedite Base format or **s** for long character-string format.

Press F3 to retrieve the alias table.

The retrieved alias table is placed in the receiver's mailbox in the output format you specified.

If you specified **b** for Expedite Base format, the alias table will be in this format.

```
*****************************************************************************
DEFINEALIAS FUNCTIONS(E)                    *-ERASE OLD VERSION OF ALIAS TABLE
  ALIASTABLE (OTB1);
*****************************************************************************
DEFINEALIAS FUNCTION (N)                    *-CREATE NEW VERSION OF ALIAS TABLE
  ALIASTABLE (OTB1) AUTHORITY (A)           *-OWNER: ATAP
*****************************************************************************
DEFINENAME(ALIAS*01         ) SYSID(EUR)  ACCOUNT(ABCDEFGH) USERID(USER02888)
DEFINENAME(ALIAS*02         )             ACCOUNT(ABCDEFGH) USERID(USER1)
DEFINENAME(ALIAS*03         ) ALIAS(GSBL) ALIASNAME(ALIAS*01XXXXXXXX)
DEFINENAME(LEVEL1           )             ACCOUNT(BBCD    ) USERID(LEVEL1  )
*****************************************************************************
```

Here is the output format if you select format B

For an explanation of these fields, see an Expedite Base product programming guide.

If you specified **s** for long character-string format, the alias table will be in this format.

Here is the output format if you select format S

```
Account ID / USER ID       ACCT1    / USERID     This is a BILLABLE function

0004ALIAS*01          IEURABCDEFGHUSER0288ALIAS*02         ABCDEFGHUSER1    ALI
AS*03         GSBLALIAS*01XXXXXXXXLEVEL1                   BBCD    LEVEL1
```

The information is displayed in a contiguous string of 36-character entries. The text is wrapped. The table below explains the wrapped format.

#	Col	Size	Name	Description
1	1	4	Entries	Number of the following entries
2	5	16	ALIAS	Alias name
		1	ALTYPE	Alias table type - **G**, **O**, **P**, or **I** (could be a chained entry)
		3	ALID	Alias table ID or system identifier
		16	TACID	The account/user ID or Alias name to whom the Alias table entry points

Working with distribution lists

. . . .

Distribution lists can make it easier for users to communicate by letting them simultaneously send the same mail item to multiple users. For example, if a user regularly sends the same invoice information to twenty different business office users, the user can simultaneously send the invoice to all twenty by including them in a distribution list.

A distribution list is not the same as a list of trading partners. Trading partners lists restrict how and with whom users exchange mail.

As a convenience, Information Exchange Administration Services lets you create a list of trading partners by copying a user's distribution list. For information on trading partners and copying a distribution list to a list of trading partners, see Chapter 7, "Working with trading partners."

This chapter covers the following:

Understanding distribution lists

For distribution lists to work, the users on the list must be able to communicate with the user sending the mail item. Distribution lists do not define how and with whom users can communicate.

A distribution list is identified by:

■ A name consisting of up to eight characters ("List name")

■ A one-character code that identifies who can use the list ("List type")

There are two types of distribution lists:

■ Account-level distribution lists are available to every user in the account.

■ Private distribution lists are available only to the user for whom the list was created and the user's administrators.

> NOTE: For cluster user IDs, the owner of a private distribution list must be a parent user ID.

Adding a new distribution list

First, decide if you want to add an account-level or a private distribution list.

Next, make a list of the users you want to include in the distribution list. You can include users by:

■ Account ID and user ID
If the user is on another system, you must also include the user's 3-character system ID.

■ Alias
You must know:

- The type of the alias table.
- The name of the alias table.
- The user's alias name on the alias table.

For more information on alias tables, see Chapter 9, "Working with alias tables."

When you have all the information you need to add a new distribution list, follow this path.

```
M0000US          Information Exchange Administration Services
                              Main Menu
                           System ID : SY1

   Action 3     Work with one of the following:
                  1. Profiles
                  2. Alias tables
                  3. Distribution lists
                  4. Messages
```

Choose Action 3

Give the new distri-
bution list a name and
fill in A or P to specify
the type

```
M4000US                   Work with Distribution Lists

   Account ID........  ACCT1      (actions 1, 2, 3, 4, 5, or 6)
   User ID...........  USER1      (actions 1, 2, 3, 4, 5, or 6 and List type P)
   List name.........  DISTLST1   (actions 2, 3, 4, 5, or 6)
   List type (A/P)...  P          (actions 1, 2, 3, 4, 5, or 6)

   Action............  2   1. List distribution lists
                           2. Add a distribution list
                           3. Browse a distribution list
                           4. Change a distribution list
                           5. Delete a distribution list
                           6. Retrieve a distribution list
                           7. Work with groups
                           8. Work with trading partners
                           9. Copy a distribution list to a trading partner list
```

Choose Action 2

Here are some things to note about naming the distribution list:

- An account-level distribution list cannot have the same name as a group.

- An account-level distribution list and a private distribution list can have the same name.

When you finish filling in the information, press Enter.

You see a panel like this one.

```
M2300US                       Add a Distribution List

   Account ID.............  ACCT1
   User ID................  USER1     (blank for account lists)
   List name..............  DISTLST1

           ------ Partner -------  or  --------------- Alias --------- ------
   Sys     Account ID   User ID        Type   Table   Name
   ___     ACCT1        USER25         _      ___     _____
                                       P      TB6     ALIAS1
   ___     _____      _____        _      ___     _____
   ___     _____      _____        _      ___     _____
   ___     _____      _____        _      ___     _____
   ___     _____      _____        _      ___     _____
   ___     _____      _____        _      ___     _____
   ___     _____      _____        _      ___     _____
   ___     _____      _____        _      ___     _____


   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward  F8=Forward  F12=Cancel
```

Fill in an ID or alias
reference for each user
on the distribution list

You can add up to 9,990 users before you save the distribution list. If you want to add more than 9,990 users, you must save the distribution list, choose to change the new distribution list, and then add more users.

NOTE: For cluster user IDs, you can only add the parent user ID or an alias that resolves to a parent user ID to a distribution list.

Browsing a distribution list

If you only want to look through the users on a distribution list without making any changes, follow this path.

```
M4000US                  Work with Distribution Lists

  Account ID........ ACCT1     (actions 1, 2, 3, 4, 5, or 6)
  User ID.......... USER1      (actions 1, 2, 3, 4, 5, or 6 and List type P)
  List name........           (actions 2, 3, 4, 5, or 6)
  List type (A/P)... P         (actions 1, 2, 3, 4, 5, or 6)

  Action........... 1   1. List distribution lists
                        2. Add a distribution list
                        3. Browse a distribution list
                        4. Change a distribution list
                        5. Delete a distribution list
                        6. Retrieve a distribution list
                        7. Work with groups
                        8. Work with trading partners
                        9. Copy a distribution list to a trading partner list
```

Fill in the "List type"

Choose Action 1

```
M4100US                  List Distribution Lists

  Account ID.............. ACCT1
  User ID................ USER1     (blank for account lists)
  List Type.............. P

  Start at list name......  _____  (press Enter)

  Codes (multiple selection):
    B = Browse     C = Change      D = Delete      R = Retrieve

  B DISTLST1    _ DISTLST2    _ DISTLST3    _ DISTLST4    _ DISTLST5
  _ DISTLST6    B DISTLST7    _ DISTLST8    _ DISTLST9
```

Fill in B next to each distribution list you want to browse

Find the distribution list you want to look through and type **b** next to it. You can select to browse more than one distribution list.

You see a panel like this one.

```
M4200US                  Browse a Distribution List

  Account ID / User ID.... ACCT1    / USER1
  List type / name........ P / DISTLST1

    Locate Alias....................  _ ___ _____  (press Enter)
    Start at Sys, Account, or User ID  ___ _____ _____  (press Enter)

  --------- Partner ---------  or  ----------- Alias -----------
  Sys   Account ID  User ID       Type  Table   Name
        ACCT1       USER2
        ACCT1       USER3
        ACCT1       USER4
  SY2   ACCT4       USER5




  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

These are the users on this distribution list

Changing a distribution list

Occasionally, you will want to make changes to your distribution lists. Perhaps a user leaves the account or project group and no longer needs to receive the same mail items that the other users receive. Or, perhaps a new user joins the account or project group.

To change a distribution list, follow this path.

```
M4000US                    Work with Distribution Lists

    Account ID........  ACCT1     (actions 1, 2, 3, 4, 5, or 6)
    User ID..........   USER1     (actions 1, 2, 3, 4, 5, or 6 and List type P)
    List name........             (actions 2, 3, 4, 5, or 6)
    List type (A/P)...  P         (actions 1, 2, 3, 4, 5, or 6)

    Action..........    1    1. List distribution lists
                             2. Add a distribution list
                             3. Browse a distribution list
                             4. Change a distribution list
                             5. Delete a distribution list
                             6. Retrieve a distribution list
                             7. Work with groups
                             8. Work with trading partners
                             9. Copy a distribution list to a trading partner list
```

Fill in the "List type"

Choose Action 1

```
M4100US                    List Distribution Lists

Account ID.............  ACCT1
User ID................  USER1     (blank for account lists)
List Type..............  P

Start at list name......  _____  (press Enter)

Codes (multiple selection):
  B = Browse     C = Change      D = Delete     R = Retrieve

  c DISTLST1    _ DISTLST2    _ DISTLST3    _ DISTLST4     _ DISTLST5
  _ DISTLST6    c DISTLST7    _ DISTLST8    _ DISTLST9
```

Fill in C next to each distribution list you want to change

Find the distribution list you want to change and type **c** next to it. You can choose to change more than one distribution list.

You see a panel like this one.

```
M2700US                  Change a Distribution List
  Account ID / User ID....  ACCT1    / USER1
  List type / name........  P / DISTLST1

    Locate Alias....................  _ ___ _____  (press Enter)
    Start at Sys, Account, or User ID  ___ _____ _____  (press Enter)

    Codes (multiple selection):
      A = Add     D = Delete

          --------- Partner --------- or  ----------- Alias -----------
    Code  Sys   Account ID   User ID       Type  Table  Name
    D           ACCT1        USER2          _    ___    _____
    __          ACCT1        USER3          _    ___    _____
    __          ACCT1        USER4          _    ___    _____
    __    SY2   ACCT2        USER6          _    ___    _____
    A     ___   ACCT1        USER6          _    ___    _____



  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F6=Bottom  F8=Forward  F12=Cancel
```

Fill in D to delete the user from the list

Fill in A on a blank line and then fill in the ID or alias reference to add a user to the list

You can choose to add or delete more than one user at a time.

Fill in D to delete the user from the list

Fill in A on a blank line and then fill in the ID or alias reference to add a user to the list

To add a user to the list, move to the bottom of the list and fill in **a** on a blank line, and then fill in the user's information.

NOTE: For cluster user IDs, you can only add parent user IDs to a distribution list.

If there are multiple panels of data, you can press F6 to go directly to the bottom and use the next available line.

Deleting a distribution list

Occasionally, you may want to delete an entire distribution list.

To do so, follow this path.

```
M4000US                 Work with Distribution Lists

  Account ID........  ACCT1    (actions 1, 2, 3, 4, 5, or 6)
  User ID...........  USER1    (actions 1, 2, 3, 4, 5, or 6 and List type P)
  List name.........           (actions 2, 3, 4, 5, or 6)
  List type (A/P)...  P         (actions 1, 2, 3, 4, 5, or 6)

  Action...........   1   1. List distribution lists
                          2. Add a distribution list
                          3. Browse a distribution list
                          4. Change a distribution list
                          5. Delete a distribution list
                          6. Retrieve a distribution list
                          7. Work with groups
                          8. Work with trading partners
                          9. Copy a distribution list to a trading partner list
```

Fill in the "List type"

Choose Action 1

```
M4100US                 List Distribution Lists

  Account ID.............  ACCT1
  User ID................  USER1     (blank for account lists)
  List Type..............  P

  Start at list name......  _____  (press Enter)

  Codes (multiple selection):
   B = Browse     C = Change    D = Delete    R = Retrieve

  D DISTLST1    _ DISTLST2   _ DISTLST3   _ DISTLST4    _ DISTLST5
  _ DISTLST6    D DISTLST7   _ DISTLST8   _ DISTLST9
```

Fill in D next to each distribution list you want to delete

Find the distribution list you want to delete and type **d** next to it. You can delete as many distribution lists as you want.

When you are ready to delete the distribution lists, press F3. You see a panel like this one.

```
M2400US                 Delete a Distribution List

  Account ID.............  ACCT1
  User ID................  USER1     (blank for account lists)
  List name..............  DISTLIST1
  List type..............  P

  Do you want to delete this list? (Y/N)...  Y
```

To delete a distribution list, fill in Y and press F3

For more information, see "Confirming deletions" on page 27.

Retrieving a distribution list

You can retrieve a distribution list into your own mailbox or into the mailbox of a user for whom you are an administrator. You may want to do this if you or someone in your account prefers to make changes to the list in an environment other than Information Exchange Administration Services. For example, you may want to use your favorite text editor.

If you retrieve a distribution list into a cluster mailbox, you must designate a specific child user ID as the receiver.

After you follow the steps in this section, the distribution list is sent to the mailbox you specify as an inbound message from *SYSTEM* ADMINGET.

The receiver can use an Information Exchange interface program to receive the message into the environment where the receiver wants to work. The receiver is billed for receive-side charges.

After the changes are made, use the Information Exchange interface program to send the updated list back to Information Exchange.

Follow this path.

```
M4000US                   Work with Distribution Lists

   Account ID........  ACCT1     (actions 1, 2, 3, 4, 5, or 6)
   User ID...........  USER1     (actions 1, 2, 3, 4, 5, or 6 and List type P)
   List name.........            (actions 2, 3, 4, 5, or 6)
   List type (A/P)...  P         (actions 1, 2, 3, 4, 5, or 6)

   Action...........   1    1. List distribution lists
                            2. Add a distribution list
                            3. Browse a distribution list
                            4. Change a distribution list
                            5. Delete a distribution list
                            6. Retrieve a distribution list
                            7. Work with groups
                            8. Work with trading partners
                            9. Copy a distribution list to a trading partner list
```

Fill in the "List type"

Choose Action 1

```
M4100US                   List Distribution Lists

   Account ID.............  ACCT1
   User ID................  USER1      (blank for account lists)
   List Type..............  P

   Start at list name......  _____  (press Enter)

   Codes (multiple selection):
     B = Browse     C = Change     D = Delete     R = Retrieve

   R DISTLST1     _ DISTLST2     _ DISTLST3     _ DISTLST4     _ DISTLST5
   _ DISTLST6     R DISTLST7     _ DISTLST8     _ DISTLST9
```

Fill in R next to each distribution list you want to retrieve

You can retrieve more than one distribution list at a time.

You see a panel like this one.

```
M4800US                    Retrieve a Distribution List

   Account ID / User ID..............  ACCT1    / USER1
   Owning account ID / User ID........  ACCT1    / USER1
   List type / List name..............  P / DISTLIST1

Receiver's information (fill in only one line)
   Account ID - User ID............  _____ - _____
   Alias type - table - name........  _ - ___ - _____
Message name......................  _____
Message sequence..................  _____
Delivery class (P/blank)...........
Retention period (Max 180 )........  030
Output format type (B/S)..........  B




Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

Fill in one line to identify the receiver

Fill in these fields to further identify the message

Here are some tips on how to fill in this panel:

■ Fill in one line under "Receiver's information" to identify the receiver.
You can specify a user or an alias reference.

■ Fill in "Message Name" and "Message Sequence" to further identify the message.

■ For "Delivery class," use one of the following:

• For high priority delivery, type **p**
• For normal delivery, leave the field blank

■ For "Retention period," type the number of days you want the message retained in the Information Exchange mailbox.

■ For "Output format type," type **b** for Expedite Base format or **s** for long character-string format.

Press F3 to retrieve the distribution list.

The retrieved distribution list is placed in the receiver's mailbox in the output format you specified.

If you specified **b** for Expedite Base format, the distribution list will be in this format.

```
****************************************************************************
LIST FUNCTION(N)                        *-REPLACE WITH NEW COPY
     ListName(DISTLST1)    ListType (P)
     Owner(ACCOUNT(ACCT1     ))
****************************************************************************
              ACCOUNT(ABCD     )  USER(SERVICE )
              ACCOUNT(ABCD     )  USER(SERVICEA)
              ACCOUNT(ABCD     )  USER(SERVICE1)
              ACCOUNT(ABCD     )  USER(SERVICE2)
              ACCOUNT(ABCD     )  USER(SERVICE3)
   ALIAS(GUSA) ALIASNAME(SYSPROG1     )
   ALIAS(GUSA) ALIASNAME(SERVICEADMIN1 )
   SYSID(EUR)  ACCOUNT(EURO     )  USER(EURO-ABC)
   SYSID(EUR)  ACCOUNT(EURO     )  USER(EURO-1  )

****************************************************************************
```

Here is the output format if you select format B

For an explanation of these fields, see an Expedite Base product programming guide.

If you specified **s** for long character-string format, the alias table will be in this format.

Here is the output
format if you select
format S

```
 Account ID / USER ID      ACCT1     / USER ID     This is a BILLABLE function

    ABCD     SERVICE     ABCD      SERVICEA    ABCD      SERVICE1    ABCD      SERVICE
 2    ABCD    SERVICE3GUSASYSPROG1            GUSASERVICEADMIN1    IEUREURO    EURO-A
 BCIEUREURO
```

The information is displayed in a contiguous string of 20-character entries. The text is wrapped. The table below explains the wrapped format.

Size	Position	Name	Description
1	1	Entry type	If blank, this is an account ID and user ID on the local Information Exchange system. If **I**, this is an intersystem entry. If **G**, **O**, or **P**, this is the alias table type for an alias entry.
3	2	Table/sys ID	If blank, this is the local Information Exchange system. If this is an intersystem entry, this is the system ID. If this is an alias entry, this is the alias table name.
8	5	Account ID	The Information Exchange account ID for non-alias entries.
8	13	User ID	The Information Exchange user ID for non-alias entries.

Working with carbon copy relationships

The *carbon copy* function enables the delivery of an electronic copy (carbon copy) of a message to one or more recipients. The carbon copy is sent in addition to the original message. Either the sender or receiver of the message can request a carbon copy to occur.

Using the carbon copy function, a user can also redirect a message to another mailbox. Redirect differs from carbon copy in that the original message is not delivered to the original target mailbox. Instead, the message is purged at the original target mailbox and redirected to an alternate mailbox.

Information Exchange generates a carbon copy when a message meets the predefined criteria specified in a carbon copy relationship. The criteria can be defined for messages a user sends or receives.

If the original message is rejected because it fails authorization checks, no carbon copy relationships will be processed.

This chapter covers the following:

Understanding carbon copy relationships

A *carbon copy relationship* involves the following participants:

■ **Requester**
The requester is the user who defines a relationship that causes a carbon copy to be generated.

- For a carbon copy type of send, the carbon copy is generated when the requester sends mail to another user (known as the partner).

- For a carbon copy type of receive, the carbon copy is generated when the requester receives mail from another user (known as the partner).

■ **Partner**
The partner can either receive the original message sent by the requester or send an original message to the requester.

- For a carbon copy type of send, the partner is the receiver of the original message that caused the carbon copy to be generated.

- For a carbon copy type of receive, the partner is the sender of the original message that caused a carbon copy to be generated.

■ **Recipient**
The recipient is any user who is designated to receive the carbon copy of the original message.

You identify the messages that are candidates for carbon copy processing by specifying the following information in the relationship.

■ Whether the carbon copy type is send or receive
■ What data type generates the carbon copy
■ Who is indicated as the partner (You can specify one partner or all partners.)
■ Who is indicated as the recipient (For EDI data you can also specify to have the recipient resolved from the EDI header.)

You can also specify additional criteria to limit the messages that cause a carbon copy to occur.

Using Information Exchange Administration Services, you can create a carbon copy relationship that includes all data types (EDI and non-EDI), or a specific EDI data type as follows:

■ X12
■ UCS
■ EDIFACT
■ UN/TDI

NOTE: You must define a separate relationship for each recipient regardless of the data type.

All messages, except the following, are eligible for carbon copy processing:

■ A message retrieved from archive
■ Any message with a partner account of *SYSTEM*
■ A message retrieved from a library
■ A message generated as a result of a carbon copy

Understanding send and receive carbon copy relationships

A requester can define two types of carbon copy relationships that cause a carbon copy to be sent to a recipient. One type (send carbon copy) causes a carbon copy message to be generated when a requester sends a message to a specified partner or any partner. This is illustrated in Figure 2, "Generating a carbon copy when sending a message."

The other type (receive carbon copy) causes a carbon copy message to be generated and sent to a recipient when a requester receives a message from a specified partner or any partner. This is illustrated in Figure 3, "Generating a carbon copy when a message is delivered to the mailbox," on page 139.

Looking at a send carbon copy relationship

Figure 2 shows a requester sending a message to a partner, which causes a carbon copy message to be sent to the carbon copy recipient.
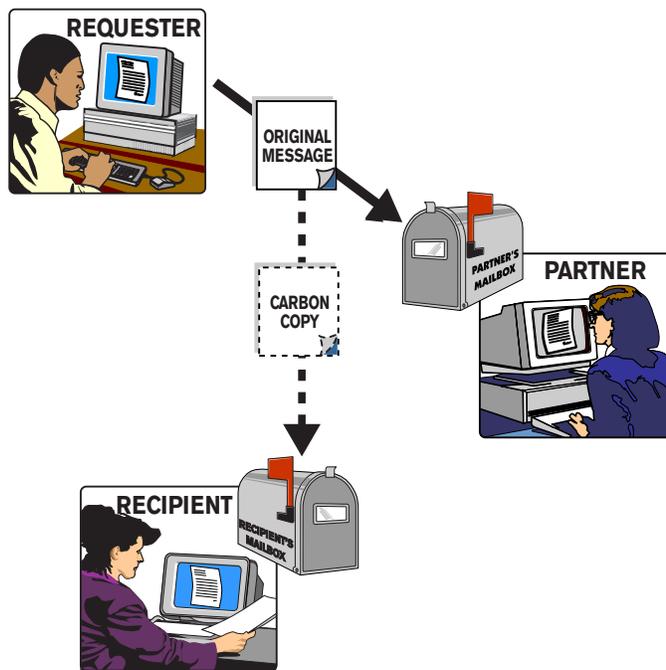
Figure 2.   Generating a carbon copy when sending a message

Looking at a receive carbon copy relationship

Figure 3 shows the original message being delivered to the requester's mailbox, which causes a carbon copy to be generated and sent to the carbon copy recipient.
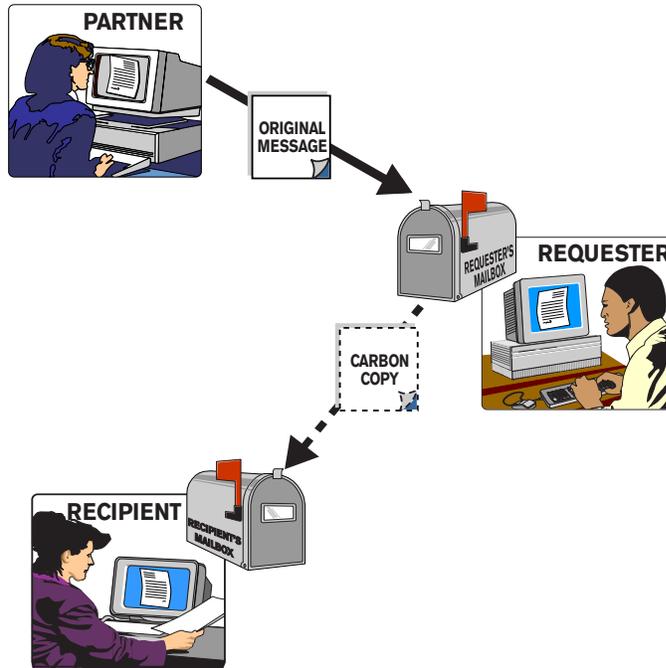
Figure 3.   Generating a carbon copy when a message is delivered to the mailbox

Understanding send and receive redirect carbon copy relationships

Within the send and receive carbon copy relationships is the option for the requester to redirect a message to a recipient. The original message is purged (not delivered to the originally intended receiver).

Here are some reasons why you may want to redirect messages:

■ You may want to send high-priority messages to an alternate mailbox.

■ You may want to send messages with a specific message class or a message name, or both, to an alternate mailbox.

■ You may want to send specific EDI messages, such as invoices or purchase orders, to an alternate mailbox.

NOTE: If a user has at least one carbon copy relationship defined with **y** specified in the "Purge original message?" field, Information Exchange holds delivery of any message to or from that user while determining if the message should be purged because it meets the criteria of the carbon copy relationship.

A delivery acknowledgment, if requested, is sent to the original message sender when a message is redirected to another mailbox.

The following rules apply for send-side redirection:

■ The sender of the original redirected message will always pay the send charge regardless of the originally intended receiver's willingness to pay the send charge.

■ No receive-side audit will be created for the original redirected message.

■ None of the receiver's carbon copy relationships will be processed.

■ The originally intended receiver is the partner in the relationship and cannot pay any of the carbon copy charges.

The redirect function is illustrated in Figure 4, "Generating a send redirected carbon copy message," on page 141 and Figure 5, "Generating a receive redirected carbon copy message," on page 142.

Looking at a send redirected carbon copy message

Figure 4 shows that, as a result of the send carbon copy relationship, the original message is purged from the partner's mailbox, and a carbon copy of the message is sent to the carbon copy recipient.
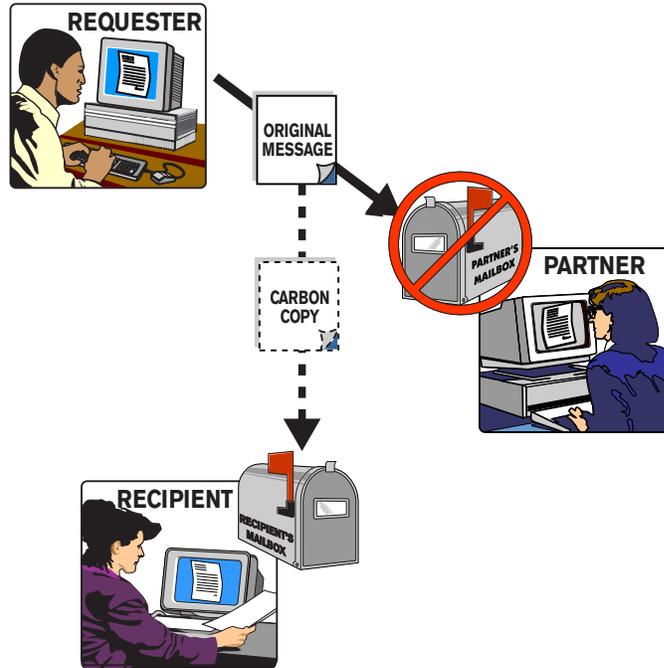
Figure 4.   Generating a send redirected carbon copy message

Looking at a receive redirected carbon copy message

Figure 5 shows that, as a result of the receive carbon copy relationship, the original message is purged from the requester's mailbox, and a carbon copy of the message is sent to the carbon copy recipient.
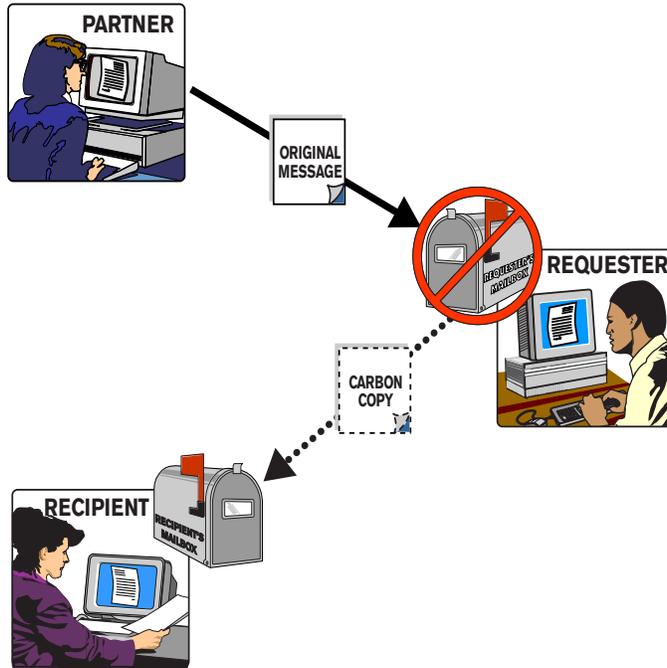
Figure 5.   Generating a receive redirected carbon copy message

Understanding carbon copy data types

There are two kinds of carbon copy relationships; one for all data types and one for EDI data types. Before defining a carbon copy relationship for sending and receiving data, you should become familiar with the features of both kinds to determine which best meets your needs. Both kinds are discussed in this section.

All data type relationships

Create a carbon copy relationship for all data types if you want to:

- Generate a carbon copy of a message regardless of the data type.

- Either specify all partners or a specific one by using a system ID (if applicable), an account ID and user ID, or an alias.

- Specify a recipient by using a system ID (if applicable), and account ID and user ID, or an alias.

- Specify message criteria as a message class, or a message name, or both.

For detailed information, see Chapter 12, "Working with carbon copy relationships for all data types."

EDI data type relationships

Create a carbon copy relationship for EDI data types if you want to:

- Generate a carbon copy message for one of the four supported EDI data types.

- Either specify all partners or a specific one in EDI terms (using the ID qualifier and ID).

- Either specify to use the recipient from the header or one in EDI terms (using the ID qualifier and ID).

- Specify the use of alternate elements (UCS only).

- Specify transaction set ID criteria (X12 and UCS only).

- Specify partner criteria (X12 and UCS only).

- Specify application reference criteria (EDIFACT and UN/TDI only).

- Specify to replace the Receiver "ID qual", where applicable, and the "ID" fields in the EDI envelope(s) of carbon copy messages.

For detailed information, see Chapter 13, "Working with carbon copy relationships for EDI data types."

How to control assignment of carbon copy charges

When a carbon copy relationship is created, requesters of carbon copy relationships specify whom they want to pay the carbon copy charges in the following two fields:

- **Who pays for processing? (O/P/R)**
  The choices for this field are:

This code:	Means:
O	The requester of the carbon copy is designated to pay the processing charge.
P	The partner (sender or receiver of the original message) is designated to pay the processing charge.
R	The recipient (receiver of the carbon copy message) is designated to pay the processing charge.

NOTE: Only users on the local Information Exchange system can be designated to pay the carbon copy processing charge.

- **Who pays for receiving? (O/P/R)**
  The choices for this field are:

This code:	Means:
O	The requester of the carbon copy is designated to pay the receive charge.
P	The partner (sender or receiver of the original message) is designated to pay the receive charge.
R	The recipient (receiver of the carbon copy message) is designated to pay the receive charge.

NOTE: Restrictions apply if any user involved in the generation of a carbon copy is connected to a message service other than the user's local Information Exchange system.

Refer to "Understanding carbon copy payment levels" on page 39 for more information about how payments are resolved, and what happens if payment combinations and destinations are invalid.

Working with carbon copy relationships for all data types

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When you want to generate a carbon copy message that is not dependent on the type of data exchanged between users, a carbon copy relationship for all data types may best meet the needs of the users you support.

To use a carbon copy relationship for all data types, you:

■ Specify the partner (the sender or receiver of the original message) and the recipient of the carbon copy message by using an Information Exchange address in the form of a system ID (if applicable), an account ID and user ID, or an alias.

■ Specify (optional) message criteria such as a message name, or a message class, or both.

This chapter covers the following:

Looking at the information in a carbon copy relationship

The information specified for a carbon copy relationship for all data types consists of the following fields. The abbreviations in parentheses, following some fields, are the names as shown on the List Carbon Copy Relationships panel.

■ **Requester account ID / user ID**
Specify the account ID and user ID of the user requesting the carbon copy.

■ **Carbon copy type (CC type)**
Specify whether the carbon copy relationship is for messages the requester sends, or for messages the requester receives. The choices are:

- **S** for send
- **R** for receive

■ **Partner:**
For a carbon copy type of send, the partner is the receiver of the original message that causes a carbon copy to be generated.

For a carbon copy type of receive, the partner is the sender of the original message that causes a carbon copy to be generated.

- **All partners? (Y/N)**
This is a required field. Specify **y** or **n**.

Specify **y** if you want a carbon copy message generated when the requester sends a message to or receives a message from any partner.

Specify **n** if you want a carbon copy message generated when the requester sends a message to or receives a message from a specific partner.

> NOTE: If you specify **y** in the "All partners?" field, this does not include partners with the account ID of *SYSTEM*.

- **User**
If the "All partners" field is set to **n**, specify the partner using an Information Exchange address in the form of a system ID (if on another system), an account ID, and user ID.

- **Alias**
Specify the partner using an alias, in the form of an alias table type, an alias table name, and an alias name.

■ **Recipient:**
Specify the recipient of a carbon copy message generated by this relationship.

- **User**
Specify a recipient using an Information Exchange address, in the form of a system ID (if on another system), an account ID, and user ID.

- **Alias**
Specify the recipient using an alias, in the form of an alias table type, an alias table name, and an alias name.

■ **Who pays for processing? (Charges CCP)**
The choices for this field are:

This code:	Means:
O	The requester of the carbon copy is designated to pay the processing charge.
P	The partner (sender or receiver of the original message) is designated to pay the processing charge.
R	The recipient (receiver of the carbon copy message) is designated to pay the processing charge.

NOTE: Only users on the local Information Exchange system can be designated to pay the carbon copy processing charge.

■ **Who pays for receiving? (Charges CCR)**
The choices for this field are:

This code:	Means:
O	The requester of the carbon copy is designated to pay the receive charge.
P	The partner (sender or receiver of the original message) is designated to pay the receive charge.
R	The recipient (receiver of the carbon copy message) is designated to pay the receive charge.

NOTE: Restrictions apply, if any user involved in the generation of a carbon copy is connected to a message service other than the user's local Information Exchange system.

■ **Crit**
This field displays as Y or N on the List Carbon Copy Relationships panel to signify whether the relationship requester has specified message criteria.

■ **Purg Orig**
This field displays as Y or N on the List Carbon Copy Relationships panel to signify whether the relationship requester wants to purge the original message when a carbon copy is generated.

■ **Acknowledgments**
Specify the type of acknowledgment you want for the carbon copy message. The acknowledgment is delivered to the carbon copy requester. Any acknowledgment type specified for the original message is not used for the carbon copy message.

This code:	Means:
A	Purged
B	Accepted for delivery and delivered
C	Accepted for delivery and purged
D	Delivered
E	Purged and delivered
F	Accepted for delivery and either purged or delivered
R	Accepted for delivery
Blank	No acknowledgment

■ **Force selective receive? (Y/blank)**
If this field contains **y**, the recipient of the carbon copy message can only receive the message if the RECEIVE command specifies one of the following criteria:

- The sender's address, in the form of a system ID (if applicable), account ID, and user ID
- The user message class
- The message key

If you leave this field blank, the message can be received without specifying any selective receive criteria. The default is **blank**.

■ **Retention period**
Specify the number of days to retain the carbon copy message in the recipient's mailbox. The default and the maximum number of days are **system defined**.

■ **Message class**
Specify information to further identify the carbon copy message. If no message class is specified (blank), then Information Exchange defaults the message class of the carbon copy message to the message class from the original message.

■ **Purge original message? (Y/N) (Purg)**
Specify whether to purge the original message from the requester's mailbox. In a receive carbon copy type, if you specify **y** in this field, the original message is not delivered to the requester. In a send carbon copy type, if you specify **y** in this field, the original message is not delivered to the partner. The default is **n**.

Only the next two fields are specific to a receive carbon copy relationship.

■ **Archive original message? (Y/N)**
Specify whether to archive the original message. If you type **y**, the message is archived using the number of days indicated in the user's profile. The default is **n**.

If you type **y** in this field, you must also type **y** in the "Purge original message?" field.

■ **If archiving, archive reference ID**
If the "Archive original message?" field is set to **y**, Information Exchange uses the value in this field as the archive reference ID when the original message is archived. The default is **%CARBON%**.

■ **Last changed on**
Displays the date of the last change to the relationship, or the date that the relationship was added (adjusted to the date format preference specified in the user's profile).

■ **Last changed by**
The account ID and user ID of the last user to change the relationship. If the relationship has not been changed since the addition of this field, ****Not available**** displays.

■ **------ Criteria ------**
 Msg class   Msg name

Specify message criteria to further limit the messages that are candidates for carbon copy. You can specify the criteria by completing the "Msg class" field, or the "Msg name" field, or both fields.

You can enter a message class, or a message name, or both, for each message criteria entry. If a field is filled in, it must match exactly for the carbon copy to be generated. If both fields are filled in, both fields must match.

The absence of a field means it does not matter what is in that field for a carbon copy to be generated; it does not mean that the field must be left blank. Message class and message name, if entered, are compared to the corresponding fields in the original message.

You can use the wildcard symbol "?" to substitute for any characters in the "Msg class" and "Msg name" fields. For example:

• To specify all messages with a user message class that starts with *CLA*, type: **cla**?

• To specify all messages with a user message class that ends with *004*, type: **?004**

• To specify all messages with a user message class that starts with **C** and end with 999, type: **c?999**

Determining if a message qualifies for carbon copy

Information Exchange examines messages that users send and receive to determine if the messages are eligible for carbon copy processing. Information Exchange bases this determination on carbon copy relationships defined by the sender and receiver of a message.

■ **For send carbon copy relationships:**
  If specified in the relationship, Information Exchange may use the following information from the message to determine if the message is a candidate for carbon copy processing.

  • The receiver (partner)
  • The message class
  • The message name

■ **For receive carbon copy relationships:**
  If specified in the relationship, Information Exchange may use the following information from the message to determine if the message is a candidate for carbon copy processing.

  • The sender (partner)
  • The message class
  • The message name

If multiple relationships qualify a message for carbon copy to the same recipient, Information Exchange examines the relationship from the most specific to the least specific for each recipient as follows:

■ Relationships that identify a specific partner and message criteria.
■ Relationships that identify a specific partner and no message criteria.
■ Relationships that specify all partners and message criteria.
■ Relationships that specify all partners and no message criteria.

ATTENTION: For each carbon copy recipient, only one send carbon copy relationship and one receive carbon copy relationship are selected. If the message generated as a result of the selected relationship fails authorization checks, then a carbon copy is not sent to that recipient.

A single user can be the recipient of a carbon copy message from both the sender and receiver.

Looking at a list of carbon copy relationships

To view a list of carbon copy relationships for all data types, follow this path.

```
M0000US          Information Exchange Administration Services
                              Main Menu
                          System ID : SY1

Action 10   Work with one of the following:
             1. Profiles
             2. Alias tables
             3. Distribution lists
             4. Messages
             5. Audit trails and session traces
             6. Trading partners
             7. Libraries
             8. Events
             9. X.400 services
            10. Carbon copy relationships
            11. Internet services
             X. Exit from Information Exchange Administration Services
```

Choose Action 10

```
M3830US               Work with Carbon Copy Relationships

Requester account ID / user ID ACCT1    / USER4
Carbon copy type (S/R)........ _
Data type (A/C/E/U/X)......... _

Action.... 2   1. List carbon copy relationship
               2. Work with carbon copy relationships for all data types
               3. Work with carbon copy relationships for EDI data types
```

Fill in the requester account ID and user ID

These fields are not required

Choose Action 2

```
M3800US    Work with Carbon Copy Relationships for All Data Types

Requester account ID / user ID ACCT1     / USER4
Carbon copy type (S/R)........ _
Partner:
  All partners? (Y/N)......... _
  User....................... ___ _____ _____ or
  Alias...................... _ ___ _____
Recipient:
  User....................... ___ _____ _____ or
  Alias...................... _ ___ _____

Action....................... 1   1. List carbon copy relationships
                                  2. Add a carbon copy relationship
                                  3. Browse a carbon copy relationship
                                  4. Change a carbon copy relationship
                                  5. Delete a carbon copy relationship
                                  6. Copy a carbon copy relationship
```

You can use these fields to narrow the list

Choose Action 1

You see a panel like this one.

```
M3810US             List Carbon Copy Relationships

Requester account ID / user ID  ACCT1    / USER4

Codes (multiple selection):
  B = Browse   C = Change   D = Delete  O = Copy

      CC  Data                                      Charges     Purg
Code Type Type Partner           Recipient          CCP CCR Crit Orig
  _   R   A       ACCT1   USER3      ACCT1   USER2    P   O   Y    Y
  _   R   A       ACCT1   USER5      ACCT1   USER1    P   P   Y    Y
  _   S   A       ACCT1   USER6      ACCT1   USER7    O   R   Y    N
  _   S   A       ACCT1   USER6      ACCT1   USER8    O   O   N    N
  _   S   A       ACCT1   USER8      ACCT1   USER9    O   O   N    N
  _   S   A    ** ALL PARTNERS **    ACCT1   USER5    O   R   Y    N
```

The List Carbon Copy Relationships panel displays

You can perform any of these functions from this list

The list displays showing both Receive relationships and Send relationships in that order. Within Receive relationships and Send relationships, specific partners are shown before All Partners relationships.

The "Code" field is the only field on this panel that can be changed. All other fields are protected and cannot be changed.

You can select more than one task on this panel. When you press Enter, your choices are processed in the order displayed. Deletions process last and only when you press F3.

Adding a carbon copy relationship

To add a carbon copy relationship for all data types, follow this path.

Fill in the requester account ID and user ID

Fill in the carbon copy type

Fill in the user ID or alias for both the partner and the recipient

Choose Action 2

```
M3800US    Work with Carbon Copy Relationships for All Data Types

Requester account ID / user ID ACCT1    / USER4
Carbon copy type (S/R)........ R
Partner:
  All partners? (Y/N)......... N
  User....................... ___ ACCT1    USER1    or
  Alias...................... _ ___ _____
Recipient:
  User....................... _____ _____ or
  Alias...................... G TB6 ALIAS6

Action...................... 2   1. List carbon copy relationships
                                 2. Add a carbon copy relationship
                                 3. Browse a carbon copy relationship
                                 4. Change a carbon copy relationship
                                 5. Delete a carbon copy relationship
                                 6. Copy a carbon copy relationship
```

If you enter an alias for either the partner or recipient, the resolved user ID is filled in when the Add a Carbon Copy Relationship panel displays.

This information displays from the previous panel

Fill in these fields

```
M3822US                 Add a Carbon Copy Relationship

Requester account ID / user ID ACCT1    / USER4
Carbon copy type.............. R
Partner (user / alias)........     ACCT1    USER1
Recipient (user / alias)......     ACCT1    USER5    / G TB6 ALIAS6

Who pays for processing? (O/P/R)..... _   Who pays for receiving? (O/P/R).... _
Acknowledgments (A/B/C/D/E/F/R/blank)     Force selective receive? (Y/blank). _
Retention period (Max 180 )......... 030 Msg class(blank to default). _____
Purge original message? (Y/N)........ N   Archive original message? (Y/N).... N
If archiving, archive reference ID... _____

 ---- Criteria ------    ----- Criteria -----    ----- Criteria -----
 Msg class  Msg name    Msg class  Msg name    Msg class  Msg name
 _____   _____      _____   _____      _____   _____
 _____   _____      _____   _____      _____   _____
 _____   _____      _____   _____      _____   _____
 _____   _____      _____   _____      _____   _____


 Command ===>
 Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

The following fields do not display for a send carbon copy relationship:

- "Archive original message?"
- "If archiving, archive reference ID"

When you complete the information on this panel, please make note of the following:

■ You must specify:

- "Who pays for processing? (O/P/R)
- "Who pays for receiving? (O/P/R)

■ A receive carbon copy type message is archived if the following is true:

- "Purge original message?" is set to y.
- "Archive original message?" is set to y.
- "Archive days" in the user's profile is greater than zero.

When you are finished, press F3 to save the information and add the relationship.

For more information about the fields on this panel, see "Looking at the information in a carbon copy relationship" on page 146.

Browsing a carbon copy relationship

You can browse (view) the information in a carbon copy relationship by choosing browse on the List Carbon Copy Relationships panel, or you can follow this path.

Fill in the requester account ID and user ID

These fields are not required

Choose Action 2

```
 M3830US              Work with Carbon Copy Relationships

Requester account ID / user ID ACCT1   / USER4
Carbon copy type (S/R)........ _
Data type (A/C/E/U/X)......... _

Action.... 2   1. List carbon copy relationship
               2. Work with carbon copy relationships for all data types
               3. Work with carbon copy relationships for EDI data types
```

Fill in the carbon copy type

Fill in the user ID or alias for both the partner and the recipient

Choose Action 3

```
 M3800US    Work with Carbon Copy Relationships for All Data Types

Requester account ID / user ID ACCT1   / USER4
Carbon copy type (S/R)........ R
Partner:
  All partners? (Y/N)......... N
  User....................... ___ ACCT1    USER3    or
  Alias...................... _ ___ _____
Recipient:
  User....................... ___ ACCT1    USER2    or
  Alias...................... _ ___ _____

Action...................... 3   1. List carbon copy relationships
                                 2. Add a carbon copy relationship
                                 3. Browse a carbon copy relationship
                                 4. Change a carbon copy relationship
                                 5. Delete a carbon copy relationship
                                 6. Copy a carbon copy relationship
```

You see a panel like this one.

The Browse a Carbon Copy Relationship panel displays

This field and the "Archive original message?" field do not display for a send carbon copy relationship

```
 M3822US             Browse a Carbon Copy Relationship

Requester account ID / user ID ACCT1   / USER4
Carbon copy type.............  R
Partner (user / alias)........     ACCT1    USER3
Recipient (user / alias)......     ACCT1    USER2

Who pays for processing? (O/P/R)..... P   Who pays for receiving? (O/P/R).... P
Acknowledgments (A/B/C/D/E/F/R/blank) B   Force selective receive? (Y/blank). Y
Retention period (Max 180 ).......... 030 Msg class(blank to default). ___
Purge original message? (Y/N)........ Y   Archive original message? (Y/N).... Y
If archiving, archive reference ID... AREFID01
Last changed on................ 05/19/00 Last changed by   ACCT1    - USER4
---- Criteria ------   ----- Criteria -----   ----- Criteria -----
Msg class   Msg name   Msg class   Msg name   Msg class   Msg name
MCLASS04    MNAME04    MCLASS05    MNAME05    MCLASS06    MNAME06
_____    _____   _____    _____   _____    _____
_____    _____   _____    _____   _____    _____
_____    _____   _____    _____   _____    _____


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu
```

When you are finished browsing the information, press F3 to exit the panel.

Changing a carbon copy relationship

You can change a carbon copy relationship by choosing the change option on the List Carbon Copy Relationships panel, or you can follow this path.

Fill in the requester account ID and user ID

These fields are not required

Choose Action 2

```
M3830US              Work with Carbon Copy Relationships

Requester account ID / user ID ACCT1    / USER4
Carbon copy type (S/R)........ _
Data type (A/C/E/U/X)........ _

Action.... 2   1. List carbon copy relationship
               2. Work with carbon copy relationships for all data types
               3. Work with carbon copy relationships for EDI data types
```

Fill in the carbon copy type

Fill in the user ID or alias for both the partner and the recipient

Choose Action 4

```
M3800US    Work with Carbon Copy Relationships for All Data Types

Requester account ID / user ID ACCT1    / USER4
Carbon copy type (S/R)........ R
Partner:
  All partners? (Y/N)......... N
  User....................... ___ ACCT1    USER1    or
  Alias...................... _ ___ _____
Recipient:
  User....................... ___ ACCT1    USER5    or
  Alias...................... _ ___ _____

Action....................... 4   1. List carbon copy relationships
                                  2. Add a carbon copy relationship
                                  3. Browse a carbon copy relationship
                                  4. Change a carbon copy relationship
                                  5. Delete a carbon copy relationship
                                  6. Copy a carbon copy relationship
```

You see a panel like this one.

This information displays from the previous panel

Fill in the changes to these fields

This field and the "Archive original message?" field do not display for a send carbon copy relationship

```
M3822US              Change a Carbon Copy Relationship

Requester account ID / user ID  ACCT1    / USER4
Carbon copy type..............  R
Partner (user / alias)........      ACCT1    USER1
Recipient (user / alias)......      ACCT1    USER5

Who pays for processing? (O/P/R)..... O   Who pays for receiving? (O/P/R).... R
Acknowledgments (A/B/C/D/E/F/R/blank) A   Force selective receive? (Y/blank). _
Retention period (Max 180 ).......... 030 Msg class(blank to default). _____
Purge original message? (Y/N)........ N   Archive original message? (Y/N).... N
If archiving, archive reference ID... %CARBON%
Last changed on................. 05/19/00 Last changed by   ACCT1    - USER4
---- Criteria ------     ----- Criteria -----     ----- Criteria -----
Msg class   Msg name     Msg class   Msg name     Msg class   Msg name

_____    _____      _____    _____      _____    _____
_____    _____      _____    _____      _____    _____
_____    _____      _____    _____      _____    _____


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

Type the changes you want on this panel, and press F3 to save the information.

Deleting a carbon copy relationship

You can delete a carbon copy relationship by choosing the delete option on the List Carbon Copy Relationships panel, or you can follow this path.

Fill in the requester account ID and user ID

These fields are not required

Choose Action 2

```
M3830US              Work with Carbon Copy Relationships

Requester account ID / user ID ACCT1    / USER4
Carbon copy type (S/R)........ _
Data type (A/C/E/U/X)......... _

Action.... 2   1. List carbon copy relationship
               2. Work with carbon copy relationships for all data types
               3. Work with carbon copy relationships for EDI data types
```

Fill in the carbon copy type

Fill in the user ID or alias for both the partner and the recipient

Choose Action 5

```
M3800US    Work with Carbon Copy Relationships for All Data Types

Requester account ID / user ID ACCT1    / USER4
Carbon copy type (S/R)........ R
Partner:
  All partners? (Y/N)......... N
  User....................... ___ ACCT1    USER3    or
  Alias...................... _ ___ _____
Recipient:
  User....................... ___ ACCT1    USER2    or
  Alias...................... _ ___ _____

Action...................... 5   1. List carbon copy relationships
                                 2. Add a carbon copy relationship
                                 3. Browse a carbon copy relationship
                                 4. Change a carbon copy relationship
                                 5. Delete a carbon copy relationship
                                 6. Copy a carbon copy relationship
```

You see a panel like this one.

This information displays from the previous panel

Fill in Y and press F3 to delete

```
M3850US            Delete a Carbon Copy Relationship

Requester account ID / user ID ACCT1    / USER4
Carbon copy type (S/R)........  R
Data type....................  A
Partner......................      ACCT1    USER3
Recipient....................      ACCT1    USER2


Do you want to delete this relationship? (Y/N)... _
```

For more information, see "Confirming deletions" on page 27.

Copying a carbon copy relationship

You can copy the information from one carbon copy relationship to another by choosing the copy option on the List Carbon Copy Relationships panel, or you can follow this path.

Fill in the requester account ID and user ID

These fields are not required

Choose Action 2

```
M3830US              Work with Carbon Copy Relationships

Requester account ID / user ID ACCT1    / USER4
Carbon copy type (S/R)........ _
Data type (A/C/E/U/X)......... _

Action.... 2   1. List carbon copy relationship
               2. Work with carbon copy relationships for all data types
               3. Work with carbon copy relationships for EDI data types
```

Fill in the carbon copy type

Fill in the user ID or alias for both the partner and the recipient

Choose Action 6

```
M3800US    Work with Carbon Copy Relationships for All Data Types

Requester account ID / user ID ACCT1    / USER4
Carbon copy type (S/R)........ R
Partner:
  All partners? (Y/N)......... Y
  User....................... ___ ACCT1    USER5    or
  Alias...................... _ ___ _____
Recipient:
  User....................... ___ ACCT1    USER1    or
  Alias...................... _ ___ _____

Action........................ 6   1. List carbon copy relationships
                                   2. Add a carbon copy relationship
                                   3. Browse a carbon copy relationship
                                   4. Change a carbon copy relationship
                                   5. Delete a carbon copy relationship
                                   6. Copy a carbon copy relationship
```

You see a panel like this one.

This information displays from the previous panel

Fill in the changes for these fields

Press F3 to save the information

```
M3861US              Copy a Carbon Copy Relationship

Requester account ID / user ID  ACCT1    / USER4

From Relationship:
  Carbon copy type (S/R)....... R
  Partner (user / alias)......      ACCT1    USER5
  Recipient (user / alias).....     ACCT1    USER1
To Relationship:
  Carbon copy type (S/R)............ R   Purge original message? (Y/N).. Y
  If carbon copy type "R" and purge original message "Y":
    Archive original message? (Y/N).. Y
  Partner:
    All partners? (Y/N).............. N
    User........................... ___ ACCT1    USER5    or
    Alias.......................... _ ___ _____
  Recipient:
    User........................... ___ ACCT1    USER1    or
    Alias.......................... _ ___ _____


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

When you request to copy a carbon copy relationship, you must change one or more of the fields under the following headings:

- "Carbon copy type"
- "Partner"
- "Recipient"

NOTE: When you copy from one relationship to another, all fields including criteria not displayed on the copy panel are copied from the "From" relationship to the "To" relationship.

Working with carbon copy relationships for EDI data types

When you want to generate a carbon copy message that is dependent upon the type of EDI data exchanged between users, choosing a carbon copy relationship for EDI data types may best meet the needs of the users you support.

To create a carbon copy relationship for EDI data types, you:

- Must specify a partner (the sender or receiver of the original message) in one of the following ways:

    - All partners, or
    - A specific partner in EDI terms, in the form of an ID qualifier (if applicable), and an ID.

- Must specify a recipient (the receiver of the carbon copy) in one of the following ways:

    - A recipient from the header, or
    - A specific recipient in EDI terms, in the form of an ID qualifier (if applicable), and an ID.

- Must specify information that will allow Information Exchange to determine the mailbox of the recipient.

- Can request to replace the receiver "ID qualifier" (if applicable), and "ID" fields in the EDI envelopes.

- Can use alternate elements of the outer header segment when evaluating the partner to determine carbon copy eligibility (UCS only).

- Can specify transaction set ID criteria or partner criteria (X12 and UCS only).

- Can specify application reference criteria (EDIFACT and UN/TDI only).

This chapter covers the following:

Understanding EDI data

Information Exchange supports carbon copy processing for the following four types of EDI data:

- EDIFACT
- UCS
- UN/TDI
- X12

EDI messages contain envelopes (an outer envelope, or both an outer and inner envelope), which contain information about the user sending the message and the user receiving the message. When you define carbon copy relationships for EDI data, you must specify a partner and a recipient.

- Partner
  - All partners (any partner will match), or
  - A specific partner (in the form of an ID qualifier (if applicable), and an EDI ID)

Information Exchange uses this information to compare the partner EDI ID in the relationship to the sender or receiver EDI ID in the message and, thereby, determines if the message is a candidate for carbon copy.

- Recipient
  - A recipient from the header, or
  - A specific recipient (in the form of an ID qualifier (if applicable), and an EDI ID)

If requested, Information Exchange substitutes the recipient EDI ID in one or both of the envelopes with information either from the relationship or from the EDI data. Envelope replacement may be needed to help ensure that the message is delivered to the correct mailbox at the receiving system.

Outer envelope for EDI messages

This table identifies the field locations in the outer envelope where the requested substitution takes place. The code used to identify each data type on the panels is shown in parentheses.

If you use this data type:	These are the outer envelope fields where requested substitution takes place:
EDIFACT (E)	The "Partner Identification Code Qualifier" field and the "Recipient Identification" field in the UNB segment.
UCS (C)	The "Applications Receiver's code" field (BG04) or the "Communications Password" field (BG02) in the BG segment.
UN/TDI (U)	The "Unto Code" or the "Unto Name" in the STX segment.
X12 (X)	The "Interchange ID Qualifier" field and the "Interchange Receiver ID" field in the ISA segment.

Inner envelope for EDI messages

Of the four supported data types, only two have inner envelopes where the "Recipient ID" field (from the relationship) can replace the "Application Receiver's Code" field in the envelope. This table identifies the field locations in the envelope where the requested substitution takes place.

This data type:	These are the inner envelope fields where requested substitution takes place:
UCS (C)	The "Application Receiver's Code" field in the GS segment.
X12 (X)	The "Application Receiver's Code" field in the GS segment.

Looking at the information in an EDI carbon copy relationship

The information specified for a carbon copy relationship for EDI data consists of the following fields. The abbreviations in parentheses following some fields are the names as shown on the List Carbon Copy Relationships panel.

- **Requester account ID / user ID**
  Specify the account ID and user ID of the user requesting the carbon copy.

- **Carbon copy type (CC type)**
  Specify whether the carbon copy is for messages the requester sends, or for messages the requester receives. The choices are:

  - **S** for send
  - **R** for receive

- **Data type**
  Specify the type of data the requester wants to carbon copy. The choices are:

  - **C** for UCS (Uniform Communications Standard)

  - **E** for EDIFACT (Electronic Data Interchange for Administration Commerce and Transportation)

  - **U** for UN/TDI (United Nations/Trade Data Interchange)

  - **X** for X12 (American National Standards Institute X12 Data Standard)

- **Partner:**
  For a carbon copy type of send, the partner is the receiver of the original message that causes a carbon copy to be generated.

  For a carbon copy type of receive, the partner is the sender of the original message that causes a carbon copy to be generated.

  - **All partners? (Y/N)**
    This is a required field. You must specify **y** or **n**.

    Specify **y** if you want a carbon copy message generated when the requester sends a message to, or receives a message from, any partner.

    Specify **n** if you want a carbon copy message generated when the requester sends a message to, or receives a message from, a specific partner.

    NOTE: If you specify **y** in the "All partners?" field, this does not include partners with the account ID of *SYSTEM*

  - **ID qualifier and ID**
    Specify a partner in EDI terms. When the requester exchanges messages with this partner, a carbon copy message may be created and sent to the recipient's mailbox identified in the relationship.

The ID qualifier and ID information is contained in the header of an EDI message within the outer envelope. The table below shows which EDI data types require an ID qualifier and the maximum character length for each field.

Data type:	Requires an ID qualifier?	ID qualifier max length	ID max length:
EDIFACT (E)	No	4	35
UCS (C)	N/A	N/A	12
UN/TDI (U)	N/A	N/A	35
X12 (X)	Yes	2	15

■ **Recipient:**
Specify the recipient of the carbon copy message generated in this relationship.

• **Recipient from header? (Y/N)**
Specify **y** if the EDI ID in the inner or outer envelope will be used.

• **If N, ID qualifier and ID**
If you specify **n** in the "Recipient from header? (Y/N)" field, specify the carbon copy recipient in EDI terms. These fields follow the same format as the partner "ID qualifier and ID" fields.

The following field displays if "Recipient from header? (Y/N) is n:

■ **Recipient's mailbox:**
This is the Information Exchange mailbox address of the recipient. The carbon copy message is sent to this mailbox.

• **User**
Specify the recipient's mailbox using a system ID (if on another system), an account ID, and user ID.

• **Alias**
Specify the recipient using an alias, in the form of an alias table type, an alias table name, and an alias name.

The following field displays if "Recipient from header (Y/N)" is y:

■ **Alias table type and table name to use when resolving the EDI receiver ID from the header to a recipient's mailbox:**
• **Table type and table name**
This is the alias table type and table name that will be used, along with the EDI receiver ID from the message, to resolve the Information Exchange mailbox of the carbon copy recipient. When resolving the recipient's mailbox, the EDI receiver ID from the message is used as the alias name, along with the alias table type and table name provided.

- **Put recipient ID qual / ID (Y/N):**
  - **In outer envelope**?
    Specify **y** to replace the ID qualifier and ID contained in the EDI message header with one of the following:

    - If no partner criteria are defined and "Recipient from header?" field is set to **n**, the information specified in the Recipient's "ID qualifier and ID" fields in the relationship.
    - If no partner criteria are defined and "Recipient from header?" field is set to **y**, the Receiver's ID from the outer envelope.
    - If partner criteria are defined, the Application Receiver's code of the GS segment that qualifies the message for carbon copy.

    This information may be used by the receiving system to route the message to the carbon copy recipient.

  - **In inner envelope?**
    Specify **y** to replace the ID contained in the EDI message header with one of the following:

    - If no partner criteria are defined and "Recipient from header?" is set to **n**, the information specified in the "Recipient's ID qualifier and ID" fields in the relationship.
    - If no partner criteria are defined and "Recipient from header" is set to **y**, the Receiver's ID from the outer envelope.
    - If partner criteria are defined, the Application Receiver's code of the GS segment that qualified the message for carbon copy.

    This information may be used by the receiving system to route the message to the carbon copy recipient.

- **Use alternate element BG01/BG02? (Y/N) (UCS only)**
  Specify **y** to use the BG01 and BG02 elements of the BG segment when evaluating the partner of the message to determine carbon copy eligibility and envelope replacement.

  Specify **n** to use the BG03 and BG04 elements of the BG segment when evaluating the partner of the message to determine carbon copy eligibility and envelope replacement.

  NOTE: If you specify **y** in this field, up to 10 characters of the partner ID are used for comparison and up to 10 characters of the receiver's information will be used for replacement, if requested.

■ **Who pays for processing? (Charges CCP)**
The choices for this field are:

This code:	Means:
O	The requester of the carbon copy is designated to pay the processing charge.
P	The partner (sender or receiver of the original message) is designated to pay the processing charge.
R	The recipient (receiver of the carbon copy message) is designated to pay the processing charge.

NOTE: Only users on the local Information Exchange system can be designated to pay the carbon copy processing charge.

■ **Who pays for receiving? (Charges CCR)**
The choices for this field are:

This code:	Means:
O	The requester of the carbon copy is designated to pay the receive-side charge.
P	The partner (sender or receiver of the original message) is designated to pay the receive-side charge.
R	The recipient (receiver of the carbon copy message) is designated to pay the receive-side charge.

NOTE: Restrictions apply if any user involved in the generation of a carbon copy is connected to a message service other than the user's local Information Exchange system.

■ **Crit**
This field displays as Y or N on the List Carbon Copy Relationships panel to signify whether the relationship requester has specified EDI criteria.

- **Purg Orig**

  The "Purg orig" column on the List Carbon Copy Relationships panel may display one of the following values, depending on what was specified on the Add a Carbon Copy Relationship, Change a Carbon Copy Relationship, Add EDI Criteria, or Change EDI Criteria panels:

  - **C (X12 and UCS data)**

  If the "Always purge original message?" field is **n** on the Add a Carbon Copy Relationship or Change a Carbon Copy Relationship panels and one or more transaction set ID criteria have a value of **y** in the "Purge Orig.?" field on the Add EDI Criteria or Change EDI Criteria panels.

  - **Y**

  For X12 and UCS data, if the "Always purge original message?" field is **y** on the Add a Carbon Copy Relationship or Change a Carbon Copy Relationship panels.

  For EDIFACT and UN/TDI data, if the "Purge original message?" field is **y** on the Add a Carbon Copy Relationship or Change a Carbon Copy Relationship panels.

  - **N**

  For X12 and UCS data, if the "Always purge original message?" field is **n** on the Add a Carbon Copy Relationship or Change a Carbon Copy Relationship panels and no transaction set ID criteria are specified with a value of **y** in the "Purge orig.?" field on the Add EDI Criteria or Change EDI Criteria panel.

  For EDIFACT and UN/TDI data, if the "Purge original message?" field is **n** on the Add a Carbon Copy Relationship or Change a Carbon Copy Relationship panels.

- **Acknowledgments**

  Specify the type of acknowledgment you want for the carbon copy message. The acknowledgment is delivered to the carbon copy requester. The acknowledgments requested for the original message are not carried over to any carbon copy messages generated.

  The default is blank.

This code:	Means:
A	Purged
B	Accepted for delivery and delivered
C	Accepted for delivery and purged
D	Delivered
E	Purged and delivered
F	Accepted for delivery and either purged or delivered
R	Accepted for delivery
Blank	No acknowledgment

■ **Force selective rcv? (Y/blank)**
If this field contains **y**, the recipient of the carbon copy message can only receive the message if the RECEIVE command specifies at least one of the following criteria:

- The sender's address, in the form of a system ID (if applicable), an account ID, and user ID
- The user message class
- The message key

The value specified for "Forced selective rcv?" for the original message is not carried over to any carbon copy messages generated.

If you leave this field blank, the message can be received without specifying any selective receive criteria. The default is **blank**.

■ **Retention period (max 180)**
Specify the number of days to retain the carbon copy message in the Information Exchange mailbox.

The value specified for "Retention period" for the original message is not carried over to any carbon copy messages generated.

The default and the maximum number of days are **system defined**.

■ **Msg class (blank to def.)**
Specify information to further identify the carbon copy message. If no message class is specified (blank), then Information Exchange defaults the message class of the carbon copy message to the message class from the original message.

The following field displays only if the data type is E or U:

■ **Purge original message? (Y/N) (Purg)**
Specify **y** to purge the original message from the requester's mailbox. The default is **n**.

The following field displays only if the data type is C or X:

■ **Always purge original message? (Y/N)**
Specify **y** to always purge the original message from the requester's mailbox. The default is **n**.

If **n** is specified, an option to purge the original message is available using the "Purge Orig.?" field on the Change EDI Criteria panel when specifying transaction set ID criteria.

The next two fields are specific to a receive carbon copy relationship:

■ **Archive original message? (Y/N)**
Specify whether to archive the original message. If you specify **y**, the message is archived and retained for the number of archive days indicated in the user's profile. The default is **n**.

If you type **y** in this field, you must also type **y** in the "Purge original message?" field, or the "Always purge original message?" field.

■ **If archiving, archive reference ID**
If the "Archive original message?" field is set to **y**, Information Exchange uses the value in this field as the archive reference ID when the original message is archived. The default is **%CARBON%**.

■ **Specify EDI criteria? (Y/N)**
This field displays on the Add a Carbon Copy Relationship panel and on the Change a Carbon Copy Relationship panel. When you add a relationship for EDI data types, type **y** if you want to define EDI criteria (Transaction Set ID, Partner, or Application Reference). The default displays as **N**.

When you change a relationship and no criteria exist, type **y** if you want to define EDI criteria.

■ **List EDI Criteria? (Y/N)**
This field displays on the Add a Carbon Copy Relationship panel, the Browse a Carbon Copy Relationship panel, and the Change a Carbon Copy Relationship panel, if criteria are defined. Type **y** to view or change criteria. The default displays as **N**, for add and change. The default displays as **blank** for browse.

■ **EDI criteria exists? (Y/N)**
This field displays as **N** on the Browse a Carbon Copy Relationship panel, in a protected field, when no criteria are defined for the relationship.

The following field displays only if the data type is C or X:

■ **Criteria type? (T/P)**
Specify **t** for transaction set criteria. If transaction set criteria are specified, matching will be done on the transaction set ID found in the ST segment of the inner envelope.

Specify **p** for partner criteria. If partner criteria are specified, matching will be done on the receiver ID or sender ID found in the GS segment of the inner envelope.

NOTE: The criteria type cannot be changed once criteria are defined. In order to change the criteria type, you must blank out the defined criteria.

The following two fields display only on the Browse a Carbon Copy Relationship and Change a Carbon Copy Relationship panels:

■ **Last changed on**
The date of the last change to the relationship, or if the relationship has not been changed since its addition, the date that the relationship was added (adjusted to the date format preference specified in the user's profile).

■ **Last changed by**
The account ID and user ID of the last user to change the relationship. If the relationship has not been changed since the addition of this field, ****Not available**** displays.

Looking at EDI criteria

Specify EDI criteria to further limit the messages that are candidates for carbon copy.

Criteria are checked against the message in the order that they are entered on the panel. If replacement was requested, the Application Receiver's code of the first GS segment that qualified the message for carbon copy will be used.

These fields are for X12 and UCS data types that have an EDI criteria type of T:

■ **Option A/F/L**
If you type **a** for (any), then the value in the corresponding "Transaction Set ID" field must exist in **any** ST segment of the message for the message to be a candidate for carbon copy.

If you type **f** for (first), then the value in the corresponding "Transaction Set ID" field must exist in the **first** ST segment of the message for the message to be a candidate for carbon copy.

If you type **l** for (all), then the value in the corresponding "Transaction Set ID" field must exist in all ST segments of the message for the message to be a candidate for carbon copy.

■ **Transaction Set ID**
This is the transaction set ID to match against the ST segment of the message.

■ **Purge orig?**
This field displays if **n** was specified in the "Always purge original message?" field on the Add a Carbon Copy Relationship or Change a Carbon Copy Relationship panels. If you specify **y** in this field, the original message is purged when a carbon copy message is created, because a match is made as a result of the corresponding criteria specified. The default is **n**.

These fields are for X12 and UCS data types that have an EDI criteria type of P:

■ **Application Sender's code (carbon copy type R)**
This value must match the application sender's code in the GS inner envelope for the message to be a candidate for carbon copy.

■ **Application Receiver's code (carbon copy type S)**
This value must match the application receiver's code in the GS inner envelope for the message to be a candidate for carbon copy.

For both send and receive carbon copy types, if the "Recipient from header?" option was selected, the Application Receiver's code of the GS segment that qualifies the message for carbon copy will be used, along with the alias table type and table name entered, to determine the address of the carbon copy recipient.

These fields are for EDIFACT and UN/TDI data types:

■ **Application Reference**
For an EDIFACT data type, the value in the "Application reference" field must match the application reference in the UNB segment for the message to be a candidate for carbon copy.

For a UN/TDI data type, the value in the "Application reference" field must match the application reference in the STX segment for the message to be a candidate for carbon copy.

Determining if a message qualifies for carbon copy

Information Exchange examines messages that users send and receive to determine if the messages are eligible for carbon copy processing. Information Exchange bases this determination on carbon copy relationships defined by the sender and receiver of a message.

For a message to meet the criteria in an EDI carbon copy relationship, the message must have a common data header (CDH), and the "Data type" field in the CDH must contain the same data type as contained in the relationship definition.

For example, a message must be identified as X12 in the "Data type" field of the CDH to be considered eligible for further checking for relationships defined with a data type of X12.

Once the data type is verified, Information Exchange checks the partner information to look for a match in the carbon copy relationship.

■ For receive carbon copy relationships:
   If specified in the relationship, Information Exchange may use the following information from the message to determine if the message is a candidate for carbon copy processing:

   • The sender "ID qualifier" and "ID" fields in the CDH, if the CDH sender "ID" field exists.
   • The sender "ID qualifier" and "ID" fields in the EDI outer envelope of the message, if the CDH sender "ID" field does not exist.

■ For send carbon copy relationships:
   If specified in the relationship, Information Exchange may use the following information from the message to determine if the message is a candidate for carbon copy processing:

   • The receiver "ID qualifier" and "ID" fields in the CDH, if the CDH receiver "ID" field exists.
   • The receiver "ID qualifier" and "ID" fields in the EDI outer envelope of the message, if the CDH receiver "ID" field does not exist.

Messages that do not have a CDH or do not have the "Data type" CDH field defined are not candidates for EDI carbon copy processing.

Once the partner is verified, Information Exchange checks the EDI criteria specified in the relationship to see if it matches the data in the message.

If multiple relationships qualify a message for carbon copy to the same recipient, Information Exchange examines the relationship from the most specific to the least specific for each recipient as follows:

- Relationships that identify a specific partner and EDI criteria.
- Relationships that identify a specific partner and no EDI criteria.
- Relationships that specify all partners and EDI criteria.
- Relationships that specify all partners and no EDI criteria.

NOTE: For each carbon copy recipient, only one send carbon copy relationship and one receive carbon copy relationship are selected. If the carbon copy message generated as a result of the selected relationship fails authorization checks, then the carbon copy is not sent to that recipient.

For a recipient with a system ID of ADV and an account ID of VANS, multiple carbon copy messages may be directed to a single recipient mailbox ID. However, each message must be destined to a unique EDI qualifier ID and ID pair.

Looking at a list of EDI carbon copy relationships

To view a list of EDI carbon copy relationships, follow this path.

Fill in the requester account ID and user ID

These fields are not required

Choose Action 3

```
    M3830US              Work with Carbon Copy Relationships

Requester account ID / user ID ACCT1    / USER3
Carbon copy type (S/R)........ _
Data type (A/C/E/U/X)......... _

Action.... 3   1. List carbon copy relationships
               2. Work with carbon copy relationships for all data types
               3. Work with carbon copy relationships for EDI data types
```

You can use these fields to narrow the list

Choose Action 1

```
M3840US    Work with Carbon Copy Relationships for EDI Data Types

Requester account ID / user ID ACCT1    / USER3
Carbon copy type (S/R)........ _
Data type (C/E/U/X)........... _
Partner:
  All partners? (Y/N)......... _
  ID qualifier and ID......... ____ _____
Recipient:
  Recipient from header: (Y/N) _
  If N, ID qualifier and ID... ____ _____

Action...................... 1   1. List carbon copy relationships
                                  2. Add a carbon copy relationship
                                  3. Browse a carbon copy relationship
                                  4. Change a carbon copy relationship
                                  5. Delete a carbon copy relationship
                                  6. Copy a carbon copy relationship
```

You see a panel like this one.

The List Carbon Copy Relationships panel displays

You can perform any of these functions

```
M3810US              List Carbon Copy Relationships

Requester account ID / user ID  ACCT1    / USER3

Codes (multiple selection):
B = Browse   C = Change   D = Delete  O = Copy

      CC  Data                                    Charges     Purg
Code Type Type Partner            Recipient       CCP CCR Crit Orig
 B    R    C      IDC01              IDC02          O   P   N    Y
 C    R    C      IDC03              IDC04          O   R   Y    C
 D    R    X  X1  IDX01          X2  IDX02          O   P   Y    N
 O    R    X  X3  IDX03          ** Resolve from hdr **  O   R   Y    N
 _    S    E  ** All partners **     EID00          O   P   Y    N
```

The list displays in the following order:

- "CC Type" (Receive relationships, followed by Send relationships)
- Within "CC Type", by "Data Type" (in alphabetical order)
- Within "Data Type" (in alphabetical order by "Partner"), with relationships for specific partners followed by relationships for "**All partners**"

You can select more than one task from this panel. When you press Enter, your choices are processed in the order they display. Deletions process last and only when you press F3.

Adding EDI carbon copy relationships

The four supported EDI data types vary slightly in the information needed to add an EDI carbon copy relationship. Select the task for adding the type of relationship that best suits the needs of the users you support. The tasks for adding EDI carbon copy relationships include:

- "Adding a UCS data type carbon copy relationship" on page 177.
- "Adding an EDIFACT data type carbon copy relationship" on page 180.
- "Adding a UN/TDI data type carbon copy relationship" on page 182.
- "Adding an X12 data type carbon copy relationship" on page 184.

Additional information

The Add a Carbon Copy Relationship panel and the Add EDI Criteria panel work together when adding a relationship with Transaction Set ID, Partner, or Application Reference criteria.

To save a relationship when criteria are added, do one of the following:

- Press F3 on the Add EDI Criteria panel, and then press F3 on the Add a Carbon Copy Relationship panel.

- Press F4 on the Add EDI Criteria panel.

The criteria and other relationship fields are not saved until you do this.

Adding a UCS data type carbon copy relationship

To add a relationship for a UCS data type, follow this path.

Fill in the requester account ID and user ID

These fields are not required

Choose Action 3

```
M3830US                Work with Carbon Copy Relationships

Requester account ID / user ID ACCT1   / USER3
Carbon copy type (S/R)........ _
Data type (A/C/E/U/X)......... _

Action.... 3   1. List carbon copy relationships
               2. Work with carbon copy relationships for all data types
               3. Work with carbon copy relationships for EDI data types
```

Fill in the carbon copy type and the data type

Fill in the "ID" fields for Partner (unless "All Partners?" is Y) and Recipient (unless "Recipient from header?" is Y)

Choose Action 2

```
M3840US    Work with Carbon Copy Relationships for EDI Data Types

Requester account ID / user ID ACCT1     / USER3
Carbon copy type (S/R)........ R
Data type (C/E/U/X)........... C
Partner:
  All partners? (Y/N)......... N
  ID qualifier and ID........ ____ IDC01
Recipient:
  Recipient from header? (Y/N) N
  If N, ID qualifier and ID... ____ IDC02

Action....................... 2   1. List carbon copy relationships
                                  2. Add a carbon copy relationship
                                  3. Browse a carbon copy relationship
                                  4. Change a carbon copy relationship
                                  5. Delete a carbon copy relationship
                                  6. Copy a carbon copy relationship
```

If you fill in a specific recipient, you see a panel like this one.

This information displays from the previous panel

This field and the "Archive original message?" field do not display for a send carbon copy relationship

```
M3820US              Add a Carbon Copy Relationship

Requester account ID / user ID... ACCT1    / USER3
Carbon copy type / data type..... R / C
Partner (ID qual / ID)........... ____ / IDC01
Recipient (ID qual / ID)......... ____ / IDC02

Recipient's mailbox:
  User............................... ___ _____ _____    or
  Alias..............................
Put recipient in outer envelope?(Y/N) _   In inner envelope? (Y/N)......... _
Use alternate element BG01/BG02?(Y/N) _
Who pays for processing? (O/P/R).....    Who pays for receiving? (O/P/R).. _
Acknowledgments (A/B/C/D/E/F/R/blank) _   Force selective rcv? (Y/blank)... _
Retention period (Max 180 ).......... 030 Msg class(blank to def.)..
Always purge original message? (Y/N). N   Archive original message? (Y/N).. N
If archiving, archive reference ID... _____
Specify EDI criteria? (Y/N).......... N   Criteria type? (T/P)............. _
```

Fill in the fields on this panel.

If you specify **y** for "Recipient from header?", the Add a Carbon Copy Relationship panel displays with the "Alias table type and table name to use when resolving the EDI receiver ID from the header to a recipient's mailbox" and "Table type and table name" fields, instead of the "Recipient's mailbox" fields. The rest of the fields on the panel remain the same.

The Recipient displays as "**Resolve from header**"

Fill in the alias table type and table name to use to resolve to a recipient's mailbox

```
  M3820US              Add a Carbon Copy Relationship

  Requester account ID / user ID...  ACCT1    / USER3
  Carbon copy type / data type.....  R / C
  Partner (ID qual / ID)...........    ___  / IDC01
  Recipient (ID qual / ID).........   ** Resolve from header **

  Alias table type and table name to use when resolving the EDI receiver ID from
  the header to a recipient's mailbox:
    Table type and table name...........  _ ___
```

To add criteria, type **y** in the "Specify EDI criteria?" field, specify T (transaction) or P (partner) in the "Criteria type?" field, and press Enter.

If you specify a criteria type of T, you see a panel like this one.

Fill in an Option of A, F, or L, a Transaction Set ID, and specify Y or N for "Purge orig?"

```
  M3821US                 Add EDI Criteria

  Requester account ID / user ID...  ACCT1     / USER3
  Carbon copy type / data type.....  R / C
  Partner (ID qual / ID)...........        / IDC01
  Recipient (ID qual / ID).........        / IDC02

  Option  Trans.  Purge      Option  Trans.  Purge      Option  Trans.  Purge
  A/F/L   Set ID  orig?      A/F/L   Set ID  orig?      A/F/L   Set ID  orig?
    A      850     N           _      ___     _           _      ___     _
    _      ___     _           _      ___     _           _      ___     _
    _      ___     _           _      ___     _           _      ___     _
    _      ___     _           _      ___     _           _      ___     _
    _      ___     _           _      ___     _           _      ___     _
    _      ___     _           _      ___     _           _      ___     _
```

If you enter information in either the "Option", "Transaction Set ID", or "Purge orig?" field (if applicable), you must enter information in all three fields. The default for all the fields is **blank**.

The "Purge orig?" field displays if **n** was specified on the "Always purge original message?" field on the Add a Carbon Copy Relationship panel. If you type **y** in this field, the original message is purged when a carbon copy message is created as a result of the criteria specified.

If you specify a criteria type of P, you see a panel like this one.

Fill in the Application Sender's code

```
  M3824US                 Add EDI Criteria

  Requester account ID / user ID...  ACCT1     / USER3
  Carbon copy type / data type.....  R / C
  Partner (ID qual / ID)...........        / IDC01
  Recipient (ID qual / ID).........        / IDC02

   Application         Application         Application         Application
   Sender's code       Sender's code       Sender's code       Sender's code
  _____        _____        _____        _____
  _____        _____        _____        _____
  _____        _____        _____        _____
  _____        _____        _____        _____
  _____        _____        _____        _____
  _____        _____        _____        _____
  _____        _____        _____        _____
  _____        _____        _____        _____
```

Type in the Application Sender's code**.** This value must match the application sender's code in the GS inner envelope for the message to be a candidate for carbon copy.

> NOTE: If you specify a Send carbon copy type, the Add EDI Criteria panel displays the Application Receiver's code field instead of the Application Sender's code field.

The following apply for both send and receive carbon copy relationships:

If the "Recipient from header" option was selected, the Application Receiver's code of the GS segment that qualifies the message for a carbon copy will be used, along with the alias table type and table name entered, to determine the address of the carbon copy recipient.

Criteria are checked against the message in the order that they are entered on the panel. If replacement was requested, the receiver ID of the first criteria that matched the message will be used.

Press F3 to return to the Add a Carbon Copy Relationship panel.

```
M3820US                 Add a Carbon Copy Relationship

Requester account ID / user ID...  ACCT1     / USER3
Carbon copy type / data type.....  R / C
Partner (ID qual / ID)...........        / IDC01
Recipient (ID qual / ID).........        / IDC02

Recipient's mailbox:
  User.............................  ___  ACCT1    USER1    or
  Alias............................ G TB5 ALIAS5
Put recipient in outer envelope?(Y/N) Y   In inner envelope? (Y/N)......... Y
Use alternate element BG01/BG02?(Y/N) Y
Who pays for processing? (O/P/R)..... O   Who pays for receiving? (O/P/R).. P
Acknowledgments (A/B/C/D/E/F/R/blank) A   Force selective rcv? (Y/blank)... _
Retention period (Max 180 ).......... 030 Msg class(blank to def.).. _____
Always purge original message? (Y/N). Y   Archive original message? (Y/N).. N
If archiving, archive reference ID... _____
List EDI criteria? (Y/N)............. N   Criteria type? (T/P)............. P
```

This field now reads "List EDI criteria?"

When you add criteria and return to the Add a Carbon Copy Relationship panel, the "Specify EDI criteria? field changes to "List EDI criteria?". If you need to make further changes to the criteria, prior to saving, type **y** and press Enter to return to the Add EDI Criteria panel.

Press F3 to save the information and add the relationship.

Adding an EDIFACT data type carbon copy relationship

To add a relationship for an EDIFACT data type, follow this path.

Fill in the requester account and user ID

Fill in the carbon copy type and data type

Fill in the "ID" fields for Partner (unless "All Partners?" is Y) and Recipient (unless "Recipient from header?" is Y)

Choose Action 2

```
M3840US     Work with Carbon Copy Relationships for EDI Data Types

Requester account ID / user ID ACCT1     / USER3
Carbon copy type (S/R)........ R
Data type (C/E/U/X)........... E
Partner:
  All partners? (Y/N)......... N
  ID qualifier and ID......... EE01   IDE01
Recipient:
  Recipient from header? (Y/N) N
  If N, ID qualifier and ID... EE02   IDE02

Action....................... 2   1. List carbon copy relationships
                                  2. Add a carbon copy relationship
                                  3. Browse a carbon copy relationship
                                  4. Change a carbon copy relationship
                                  5. Delete a carbon copy relationship
                                  6. Copy a carbon copy relationship
```

This information displays from the previous panel

This field and the "Archive original message?" field do not display for a send carbon copy relationship

```
M3820US              Add a Carbon Copy Relationship

Requester account ID / user ID... ACCT1     / USER3
Carbon copy type / data type..... R / E
Partner (ID qual / ID)........... EE01 / IDE01
Recipient (ID qual / ID)......... EE02 / IDE02

Recipient's mailbox:
  User............................... ___ _____ _____     or
  Alias.............................. _ ___ _____
Put recipient in outer envelope?(Y/N) _

Who pays for processing? (O/P/R)..... _   Who pays for receiving? (O/P/R).. _
Acknowledgments (A/B/C/D/E/F/R/blank)    Force selective rcv? (Y/blank)... _
Retention period (Max 180 ).......... 030 Msg class(blank to def.).. _____
Purge original message? (Y/N)........ N   Archive original message? (Y/N).. N
If archiving, archive reference ID... _____
Specify EDI criteria? (Y/N).......... N
```

The panel above displays if you fill in a specific recipient. Fill in the fields on this panel.

If you specify **y** for "Recipient from header?", the Add a Carbon Copy Relationship panel displays with the "Alias table type and table name to use when resolving the EDI receiver ID from the header to a recipient's mailbox" and "Table type and table name" fields, instead of the "Recipient's mailbox" fields. The rest of the fields on the panel remain the same.

The Recipient displays as "**Resolve from header**"

Fill in the alias table type and table name to use to resolve to a recipient's mailbox

```
M3820US              Add a Carbon Copy Relationship

Requester account ID / user ID... ACCT1     / USER3
Carbon copy type / data type..... R / E
Partner (ID qual / ID)........... EE01 / IDE01
Recipient (ID qual / ID)......... ** Resolve fromer header **

Alias table type and table name to use when resolving the EDI receiver ID from
the header to a recipient's mailbox:
  Table type and table name.......... _ ___
```

To add criteria, type **y** in the "Specify EDI criteria?" field and press Enter.

You see a panel like this one.

```
M3823US                    Add EDI Criteria


Requester account ID / user ID...  ACCT1     / USER3
Carbon copy type / data type.....  R / E
Partner (ID qual / ID)...........  EE01 / IDE01
Recipient (ID qual / ID).........  EE02 / IDE02

 Application              Application              Application
  reference               reference                reference
 APPREF01_____          APPREF02_____           APPREF03_____
 _____            _____             _____
 _____            _____             _____
 _____            _____             _____
 _____            _____             _____
 _____            _____             _____
 _____            _____             _____
```

Fill in the application reference information →

The "Application reference" field is compared to the application reference in the UNB segment. This comparison is done to determine if the message meets the criteria specified for carbon copy.

Press F3 to return to the Add a Carbon Copy Relationship panel.

```
M3820US                  Add a Carbon Copy Relationship

Requester account ID / user ID...  ACCT1     / USER3
Carbon copy type / data type.....  R / E
Partner (ID qual / ID)...........  EE01 / IDE01
Recipient (ID qual / ID).........  EE02 / IDE02

Recipient's mailbox:
  User.............................. ___ ACCT1     USER6    or
  Alias............................. _ ___ _____
Put recipient in outer envelope?(Y/N) _

Who pays for processing? (O/P/R)..... _   Who pays for receiving? (O/P/R).. _
Acknowledgments (A/B/C/D/E/F/R/blank) _   Force selective rcv? (Y/blank)... _
Retention period (Max 180 ).......... 030 Msg class(blank to def.).. _____
Purge original message? (Y/N)........ N   Archive original message? (Y/N).. N
If archiving, archive reference ID... _____
List EDI criteria? (Y/N)............. N
```

This field now reads "List EDI criteria?" →

When you add criteria and return to the Add a Carbon Copy Relationship panel, the "Specify EDI criteria? field changes to "List EDI criteria?". If you need to make further changes to the criteria, prior to saving, type **y** to return to the Add EDI Criteria panel.

When you are finished, press F3 to save the information and add the relationship.

Adding a UN/TDI data type carbon copy relationship

To add a relationship for a UN/TDI data type, follow this path.

Fill in the requester
account and user ID

Fill in the carbon copy
type and data type
Fill in the "ID" fields
for Partner (unless
"All Partners?" is Y)
and Recipient (unless
"Recipient from
header?" is Y)

Choose Action 2

```
M3840US      Work with Carbon Copy Relationships for EDI Data Types

Requester account ID / user ID ACCT1    / USER3
Carbon copy type (S/R)........ R
Data type (C/E/U/X)........... U
Partner:
  All partners? (Y/N)......... N
  ID qualifier and ID......... ___   IDU01
Recipient:
  Recipient from header? (Y/N) N
  IF N, ID qualifier and ID... ___   IDU02

Action...................... 2  1. List carbon copy relationships
                                2. Add a carbon copy relationship
                                3. Browse a carbon copy relationship
                                4. Change a carbon copy relationship
                                5. Delete a carbon copy relationship
                                6. Copy a carbon copy relationship
```

This information
displays from the
previous panel

This field and the
"Archive original
message?" field do not
display for a send
carbon copy
relationship

```
M3820US          Add a Carbon Copy Relationship for an EDI Data Type

Requester account ID / user ID... ACCT1    / USER3
Carbon copy type / data type..... R / U
Partner (ID qual / ID)...........  ____ / IDU01
Recipient (ID qual / ID).........  ____ / IDU02

Recipient's mailbox:
  User.............................. ___ _____ _____    or
  Alias............................. _ ___ _____
Put recipient in outer envelope?(Y/N) _

Who pays for processing? (O/P/R)..... _   Who pays for receiving? (O/P/R).. _
Acknowledgments (A/B/C/D/E/F/R/blank) _   Force selective rcv? (Y/blank)... _
Retention period (Max 180 ).......... 030 Msg class(blank to def.).. _____
Purge original message? (Y/N)........ N   Archive original message? (Y/N).. N
If archiving, archive reference ID... _____
Specify EDI criteria? (Y/N).......... N
```

The panel above displays if you fill in a specific recipient. Fill in the fields on this panel.

If you specify **y** for "Recipient from header?", the Add a Carbon Copy Relationship panel displays with the "Alias table type and table name to use when resolving the EDI receiver ID from the header to a recipient's mailbox" and "Table type and table name" fields instead of the "Recipient's mailbox" fields. The rest of the fields on the panel remain the same.

The Recipient
displays as
"**Resolve from
header**"

Fill in the alias
table type and table
name to use to resolve
to a recipient's
mailbox

```
M3820US              Add a Carbon Copy Relationship

Requester account ID / user ID... ACCT1    / USER3
Carbon copy type / data type..... R / U
Partner (ID qual / ID)...........  ____ / IDU01
Recipient (ID qual / ID)......... ** Resolve fromer header **

Alias table type and table name to use when resolving the EDI receiver ID from
the header to a recipient's mailbox:
  Table type and table name.......... _ ___
```

To add criteria, type **y** in the "Specify EDI criteria?" field and press Enter.

You see a panel like this one.

```
M3823US                    Add EDI Criteria

Requester account ID / user ID...  ACCT1     / USER3
Carbon copy type / data type.....  R / U
Partner (ID qual / ID)...........  ____ / ID0U1
Recipient (ID qual / ID).........  ____ / ID0U2

   Application              Application             Application
    reference               reference               reference
   APPREF04                APPREF05                APPREF06
   _____             _____             _____
   _____             _____             _____
   _____             _____             _____
   _____             _____             _____
   _____             _____             _____
   _____             _____             _____
   _____             _____             _____
```

Fill in the application reference information →

The "Application reference" field is compared to the application reference in the STX segment to determine if the message meets the criteria specified for carbon copy.

Press F3 to return to the Add a Carbon Copy Relationship panel.

```
M3820US              Add a Carbon Copy Relationship

Requester account ID / user ID...  ACCT1     / USER3
Carbon copy type / data type.....  R / U
Partner (ID qual / ID)...........  ____ / ID0U1
Recipient (ID qual / ID).........  ____ / ID0U2

Recipient's mailbox:
  User.............................. ___ ACCT1    USER5    or
  Alias............................. G TB6 ALIAS6
Put recipient in outer envelope?(Y/N) _

Who pays for processing? (O/P/R).....  _    Who pays for receiving? (O/P/R).. _
Acknowledgments (A/B/C/D/E/F/R/blank) _    Force selective rcv? (Y/blank)... _
Retention period (Max 180 )..........  030 Msg class(blank to def.).. _____
Purge original message? (Y/N)........ N    Archive original message? (Y/N).. N
If archiving, archive reference ID... _____
List EDI criteria? (Y/N)   .......... N
```

This field now reads "List EDI criteria?" →

When you add criteria and return to the Add a Carbon Copy Relationship panel, the "Specify EDI criteria? field changes to "List EDI criteria?". If you need to make further changes to the criteria, prior to saving, type **y** to return to the Add EDI Criteria panel.

When you are finished, press F3 to save the information and add the relationship.

Adding an X12 data type carbon copy relationship

To add a relationship for an X12 data type, follow this path.

Fill in the requester
account and user ID

Fill in the carbon copy
type and data type

Fill in the "ID" fields
for Partner (unless
"All Partners?" is Y)
and Recipient (unless
"Recipient from
header?" is Y)

Choose Action 2

```
M3840US     Work with Carbon Copy Relationships for EDI Data Types

Requester account ID / user ID ACCT1    / USER3
Carbon copy type (S/R)........ R
Data type (C/E/U/X)........... X
Partner:
   All partners? (Y/N)......... N
   ID qualifier and ID......... X1   IDX01
Recipient:
   Recipient from header? (Y/N) N
   If N, ID qualifier and ID... X2   IDX02

Action....................... 2    1. List carbon copy relationships
                                   2. Add a carbon copy relationship
                                   3. Browse a carbon copy relationship
                                   4. Change a carbon copy relationship
                                   5. Delete a carbon copy relationship
                                   6. Copy a carbon copy relationship
```

This information
displays from the
previous panel

This field and the
"Archive original
message?" field do
not display for a send
carbon copy
relationship

```
M3820US               Add a Carbon Copy Relationship

Requester account ID / user ID... ACCT1    / USER3
Carbon copy type / data type..... R / X
Partner (ID qual / ID)........... X1   / IDX01
Recipient (ID qual / ID)......... X2   / IDX02

Recipient's mailbox:
   User............................. ___  ACCT1    USER4    or
   Alias............................ G TB4 ALIAS4
Put recipient in outer envelope?(Y/N) _   In inner envelope? (Y/N)......... _

Who pays for processing? (O/P/R)..... _   Who pays for receiving? (O/P/R).. _
Acknowledgments (A/B/C/D/E/F/R/blank)      Force selective rcv? (Y/blank)... _
Retention period (Max 180 ).......... 030 Msg class(blank to def.)..
Always purge original message? (Y/N). N   Archive original message? (Y/N).. N
If archiving, archive reference ID... _____
Specify EDI criteria? (Y/N).......... N   Criteria type? (T/P)............. _
```

The panel above displays if you fill in a specific recipient. Fill in the fields on this panel.

If you specify **y** for "Recipient from header?", the Add a Carbon Copy Relationship panel displays with the "Alias table type and table name to use when resolving the EDI receiver ID from the header to a recipient's mailbox" and "Table type and table name" fields instead of the "Recipient's mailbox" fields. The rest of the fields on the panel remain the same.

The Recipient
displays as
"**Resolve from
header**"

Fill in the alias
table type and table
name to use to resolve
to a recipient's
mailbox

```
M3820US               Add a Carbon Copy Relationship

Requester account ID / user ID... ACCT1    / USER3
Carbon copy type / data type..... R / X
Partner (ID qual / ID)........... X1   / IDX01
Recipient (ID qual / ID)......... ** Resolve fromer header **

Alias table type and table name to use when resolving the EDI receiver ID from
the header to a recipient's mailbox:
Table type and table name.......... _ ___
```

To add criteria, type **y** in the "Specify EDI criteria?" field, specify T (transaction) or P (partner) in the "Criteria type?" field, and press Enter.

If you specify a criteria type of T, you see a panel like this one.

```
M3821US                  Add EDI Criteria

Requester account ID / user ID...  ACCT1     / USER3
Carbon copy type / data type.....  R / X
Partner (ID qual / ID)...........  X1    / IDX01
Recipient (ID qual / ID).........  X2    / IDX02

Option  Trans.  Purge    Option  Trans.  Purge    Option  Trans.  Purge
A/F/L   Set ID  orig?    A/F/L   Set ID  orig?    A/F/L   Set ID  orig?
 F       850     N         A       855     Y         L       862     N
 _      ____     _         _      ____     _         _      ____     _
 _      ____     _         _      ____     _         _      ____     _
 _      ____     _         _      ____     _         _      ____     _
 _      ____     _         _      ____     _         _      ____     _
 _      ____     _         _      ____     _         _      ____     _
```

Fill in an Option of A, F, or L, a Transaction Set ID, and specify Y or N for "Purge Orig?"

If you enter information in the "Option", "Transaction Set ID", or "Purge Orig?" fields (if applicable), you must enter information in all three fields. The default for all the fields is **blank**.

The "Purge orig?" field displays if **n** was specified on the "Always purge original message?" field on the Add a Carbon Copy Relationship panel. If you type **y** in this field, the original message is purged when a carbon copy message is created as a result of the criteria specified.

If you specify a criteria type of P, you see a panel like this one.

```
M3824US                  Add EDI Criteria

Requester account ID / user ID...  ACCT1     / USER3
Carbon copy type / data type.....  R / C
Partner (ID qual / ID)...........       / IDX01
Recipient (ID qual / ID).........       / IDX02

  Application        Application        Application        Application
 Sender's code      Sender's code      Sender's code      Sender's code
 _____       _____       _____       _____
 _____       _____       _____       _____
 _____       _____       _____       _____
 _____       _____       _____       _____
 _____       _____       _____       _____
 _____       _____       _____       _____
 _____       _____       _____       _____
```

Fill in the Application Sender's code

Type in the Application Sender's code. This value must match the application sender's code in the GS inner envelope for the message to be a candidate for carbon copy.

NOTE: If you specify a Send carbon copy type, the Add EDI Criteria panel displays the Application Receiver's code field instead of the Application Sender's code field.

The following apply for both send and receive carbon copy relationships:

If the "Recipient from header" option was selected, the Application Receiver's code of the GS segment that qualifies the message for a carbon copy will be used, along with the alias table type and table name entered, to determine the address of the carbon copy recipient.

Criteria are checked against the message in the order that they are entered on the panel. If replacement was requested, the receiver ID of the first criteria that matched the message will be used.

Press F3 to return to the Add a Carbon Copy Relationship panel.

```
M3820US                Add a Carbon Copy Relationship

Requester account ID / user ID... ACCT1    / USER3
Carbon copy type / data type..... R / X
Partner (ID qual / ID)........... X1   / IDX01
Recipient (ID qual / ID)......... X2   / IDX02

Recipient's mailbox:
  User..............................  ___ ACCT1    USER4     or
  Alias............................. G TB4 ALIAS4
Put recipient in outer envelope?(Y/N) _   In inner envelope? (Y/N)......... _

Who pays for processing? (O/P/R)..... _   Who pays for receiving? (O/P/R).. _
Acknowledgments (A/B/C/D/E/F/R/blank) _   Force selective rcv? (Y/blank)... _
Retention period (Max 180 ).......... 030 Msg class(blank to def.).. _____
Always purge original message? (Y/N). N   Archive original message? (Y/N).. N
If archiving, archive reference ID... ___
List EDI criteria? (Y/N)............. N   Criteria type? (T/P)............. _
```

This field now
reads "List EDI
criteria?"

When you add criteria and return to the Add a Carbon Copy Relationship panel, the "Specify EDI criteria? field changes to "List EDI criteria?". If you need to make further changes to the criteria, prior to saving, type **y** to return to the Add EDI Criteria panel.

When you are finished, press F3 to save the information and add the relationship.

Browsing an EDI carbon copy relationship

You can browse (view) the information in an EDI carbon copy relationship by choosing the browse option on the List Carbon Copy Relationships panel, or you can follow this path.

Fill in the requester account and user ID

Fill in the carbon copy type and data type

Fill in the "ID" fields for Partner (unless "All Partners?" is Y) and Recipient (unless "Recipient from header?" is Y)

Choose Action 3

```
M3840US       Work with Carbon Copy Relationships for EDI Data Types

Requester account ID / user ID ACCT1     / USER3
Carbon copy type (S/R)........ R
Data type (C/E/U/X)........... C
Partner:
  All partners? (Y/N)......... N
  ID qualifier and ID......... ____  IDC01
Recipient:
  Recipient from header? (Y/N) N
  If N, ID qualifier and ID... ____  IDC02

Action...................... 3   1. List carbon copy relationships
                                 2. Add a carbon copy relationship
                                 3. Browse a carbon copy relationship
                                 4. Change a carbon copy relationship
                                 5. Delete a carbon copy relationship
                                 6. Copy a carbon copy relationship
```

The Browse a Carbon Copy Relationship panel displays

This field and the "Archive original message?" field do not display for a send carbon copy relationship

```
M3820US              Browse a Carbon Copy Relationship

Requester account ID / user ID... ACCT1     / USER3
Carbon copy type / data type..... R / C
Partner (ID qual / ID)...........       / IDC01
Recipient (ID qual / ID)........       / IDC02

Recipient's mailbox:
  User............................... ___  ACCT1     USER1    or
  Alias..............................
Put recipient in outer envelope?(Y/N) Y   In inner envelope? (Y/N)......... Y
Use alternate element BG01/BG02?(Y/N) Y
Who pays for processing? (O/P/R)..... O   Who pays for receiving? (O/P/R).. P
Acknowledgments (A/B/C/D/E/F/R/blank) A   Force selective rcv? (Y/blank)... _
Retention period (Max 180 ).......... 030 Msg class(blank to def.)..
Always purge original message? (Y/N). Y   Archive original message? (Y/N).. N
If archiving, archive reference ID...
List EDI criteria? (Y/N)............. Y   Criteria type? (T/P)............. T
Last changed on.............. 05/23/00  Last changed by  ACCT1     - USER3
```

NOTE: The "In inner envelope" field does not display for EDIFACT and UN/TDI data types.

The "Use alternate element BG01/BG02? (Y/N)" field only displays for UCS data.

If no criteria exist for this relationship, the "List EDI criteria" field displays as "EDI criteria exists?" with a default value of N.

If EDI criteria exist for this relationship, the "List EDI criteria?" field displays with a default value of N. To browse the EDI criteria for this relationship, type **y** in the "List EDI criteria?" field and press Enter.

You see a panel like this one for criteria type T (UCS or X12 data types).

Press F3 to exit this
panel

```
M3821US                  Browse EDI Criteria

Requester account ID / user ID...  ACCT1     / USER3
Carbon copy type / data type.....  R / C
Partner (ID qual / ID)...........       / IDC01
Recipient (ID qual / ID).........       / IDC02

Option  Trans.  Purge       Option  Trans.  Purge       Option  Trans.  Purge
A/F/L   Set ID  orig?       A/F/L   Set ID  orig?        A/F/L   Set ID  orig?
  A      850      N           _      ____     _            _      ____      _
  _      ____     _           _      ____     _            _      ____      _
  _      ____     _           _      ____     _            _      ____      _
  _      ____     _           _      ____     _            _      ____      _
  _      ____     _           _      ____     _            _      ____      _
  _      ____     _           _      ____     _            _      ____      _
  _      ____     _           _      ____     _            _      ____      _
```

You see a panel like this one for criteria type P (UCS or X12 data types).

Fill in the Application
Sender's code ──────────▶

```
M3824US                  Browse EDI Criteria

Requester account ID / user ID...  ACCT1     / USER3
Carbon copy type / data type.....  R / C
Partner (ID qual / ID)...........       / IDC01
Recipient (ID qual / ID).........       / IDC02

 Application         Application          Application          Application
 Sender's code       Sender's code        Sender's code        Sender's  code
APPLSNDR01           _____         _____         _____
_____         _____         _____         _____
_____         _____         _____         _____
_____         _____         _____         _____
_____         _____         _____         _____
_____         _____         _____         _____
_____         _____         _____         _____
```

You see a panel like this one for EDIFACT or UN/TDI data types.

Press F3 to exit this
panel

```
 M3823US                  Browse EDI Criteria

Requester account ID / user ID...  ACCT1    / USER3
Carbon copy type / data type.....  R / E
Partner (ID qual / ID)...........        / IDE01
Recipient (ID qual / ID)........        / IDE02

 Application          Application          Application
  reference            reference            reference
 APPREF07             APPREF08             APPREF09
 _____           _____           _____
 _____           _____           _____
 _____           _____           _____
 _____           _____           _____
 _____           _____           _____
 _____           _____           _____
 _____           _____           _____
```

For more information about the fields on these panels, see "Looking at the information in an EDI carbon copy relationship" on page 165, and "Looking at EDI criteria" on page 172.

Changing an EDI carbon copy relationship

You can change the information in an EDI carbon copy relationship by choosing the change option on the List Carbon Copy Relationships panel, or you can follow this path.

Fill in the requester account and user ID

Fill in the carbon copy type and data type

Fill in the "ID" fields for Partner (unless "All Partners?" is Y) and Recipient (unless "Recipient from header?" is Y)

Choose Action 4

```
M3840US       Work with Carbon Copy Relationships for EDI Data Types

Requester account ID / user ID ACCT1     / USER3
Carbon copy type (S/R)........ R
Data type (C/E/U/X).......... C
Partner:
  All partners? (Y/N)......... N
  ID qualifier and ID......... ____ IDC01
Recipient:
   Recipient from header? (Y/N) N
  If N, ID qualifier and ID... ____ IDC02

Action...................... 4   1. List carbon copy relationships
                                 2. Add a carbon copy relationship
                                 3. Browse a carbon copy relationship
                                 4. Change a carbon copy relationship
                                 5. Delete a carbon copy relationship
                                 6. Copy a carbon copy relationship
```

This information displays from the previous panel and is protected

You can change the information in these fields

This field and the "Archive original message?" field do not display for a send carbon copy relationship

```
M3820US              Change a Carbon Copy Relationship

Requester account ID / user ID... ACCT1     / USER3
Carbon copy type / data type..... R / C
Partner (ID qual / ID)........... ____  / IDC01
Recipient (ID qual / ID)......... ____  / IDC02

Recipient's mailbox:
  User............................. ____ ACCT1    USER5      or
  Alias............................ G TB6 ALIAS6
Put recipient in outer envelope?(Y/N) Y   In inner envelope? (Y/N)......... Y
Use alternate element BG01/BG02?(Y/N) N
Who pays for processing? (O/P/R)..... O   Who pays for receiving? (O/P/R).. R
Acknowledgments (A/B/C/D/E/F/R/blank) A   Force selective rcv? (Y/blank)... _
Retention period (Max 180 ).......... 030 Msg class(blank to def.).. MCLASS4_
Always purge original message? (Y/N). N   Archive original message? (Y/N).. N
If archiving, archive reference ID... _____
List EDI criteria? (Y/N)............. N   Criteria type? (T/P)............. T
Last changed on.............. 05/23/00   Last changed by  ACCT1    - USER3
```

NOTE: The "In inner envelope" field does not display for EDIFACT and UN/TDI data types.

The "Use alternate element BG01/BG02? (Y/N)" field only displays for UCS data.

If no criteria exist for this relationship, the "List EDI criteria" field displays as "Specify EDI criteria?" with a default value of N.

If EDI criteria exist for this relationship, the "List EDI criteria?" field displays with a default value of N. To change the criteria, type **y** in the "List EDI criteria?" field and press Enter.

You see a panel like this one for criteria type T (X12 or UCS data types).

```
M3821US              Change EDI Criteria

Requester account ID / user ID...  ACCT1   / USER3
Carbon copy type / data type.....  R / C
Partner (ID qual / ID)...........  ____  / IDC01
Recipient (ID qual / ID).........  ____  / IDC02

Option  Trans.  Purge      Option  Trans.  Purge      Option  Trans.  Purge
A/F/L   Set ID  orig?      A/F/L   Set ID  orig?      A/F/L   Set ID  orig?
  A      855      N          F      850      Y          _      ___      _
  _      ___      _          _      ___      _          _      ___      _
  _      ___      _          _      ___      _          _      ___      _
  _      ___      _          _      ___      _          _      ___      _
  _      ___      _          _      ___      _          _      ___      _
  _      ___      _          _      ___      _          _      ___      _
  _      ___      _          _      ___      _          _      ___      _
```

You see a panel like this one for criteria type P (X12 and UCS data types).

```
M3824US              Change EDI Criteria

Requester account ID / user ID...  ACCT1     / USER3
Carbon copy type / data type.....  R / C
Partner (ID qual / ID)...........       / IDC01
Recipient (ID qual / ID).........       / IDC02

 Application        Application        Application        Application
Sender's code      Sender's code      Sender's code      Sender's code
APPLSNDR01         _____        _____        _____
_____        _____        _____        _____
_____        _____        _____        _____
_____        _____        _____        _____
_____        _____        _____        _____
_____        _____        _____        _____
_____        _____        _____
_____        _____        _____
```

Fill in the Application Sender's code →

You see a panel like this one, if you use EDIFACT or UN/TDI data.

```
M3823US              Change EDI Criteria

Requester account ID / user ID...  ACCT1   / USER3
Carbon copy type / data type.....  R / E
Partner (ID qual / ID)...........       / IDE01
Recipient (ID qual / ID).........       / IDE02

 Application        Application        Application
  reference         reference          reference
APPREF01           APPREF02           APPREF03
_____        _____        _____
_____        _____        _____
_____        _____        _____
_____        _____        _____
_____        _____        _____
_____        _____        _____
_____        _____        _____
```

The Change a Carbon Copy Relationship panel and the Change EDI Criteria panels work together when changing a relationship with Transaction Set ID, Partner, and Application Reference criteria.

To change criteria and save a relationship, do one of the following:

- Press F3 on the Change EDI Criteria panel, and then press F3 on the Change a Carbon Copy Relationship panel.

- Press F4 on the Change EDI Criteria panel.

The criteria and other relationship fields are not saved until you do this.

Deleting an EDI carbon copy relationship

You can delete an EDI carbon copy relationship by choosing the delete option on the List Carbon Copy Relationships panel, or you can follow this path.

Fill in the requester
account and user ID

Fill in the carbon copy
type and
data type

Fill in the "ID" fields
for Partner (unless
"All Partners?" is Y)
and Recipient (unless
"Recipient from
header?" is Y)

Choose Action 5

```
M3840US        Work with Carbon Copy Relationships for EDI Data Types

Requester account ID / user ID ACCT1    / USER3
Carbon copy type (S/R)........ R
Data type (C/E/U/X)........... X
Partner:
  All partners? (Y/N)......... N
  ID qualifier and ID......... X1   IDX01
Recipient:
  Recipient from header? (Y/N) N
  If N, ID qualifier and ID... X2   IDX02

Action...................... 5   1. List carbon copy relationships
                                 2. Add a carbon copy relationship
                                 3. Browse a carbon copy relationship
                                 4. Change a carbon copy relationship
                                 5. Delete a carbon copy relationship
                                 6. Copy a carbon copy relationship
```

This information
displays from the
previous panel

Fill in Y and press F3
to delete

```
M3850US              Delete a Carbon Copy Relationship

Requester account ID / user ID.  ACCT1    / USER3
Carbon copy type (S/R)......... R
Data type..................... X
Partner (ID qual / ID)........ X1   / IDX01
Recipient (ID qual / ID)...... X2   / IDX02

Do you want to delete this relationship? (Y/N)... _
```

For more information, see "Confirming deletions" on page 27.

Copying an EDI carbon copy relationship

You can copy an EDI carbon copy relationship by choosing the copy option on the List Carbon Copy Relationships panel, or you can follow this path.

Fill in the requester account and user ID

Fill in the carbon copy type and data type

Fill in the "ID" fields for Partner (unless "All Partners?" is Y) and Recipient (unless "Recipient from header?" is Y)

Choose Action 6

```
M3840US      Work with Carbon Copy Relationships for EDI Data Types

Requester account ID / user ID ACCT1    / USER3
Carbon copy type (S/R)........ R
Data type (C/E/U/X)........... E
Partner:
  All partners? (Y/N)......... N
  ID qualifier and ID......... EE01 IDE01
Recipient:
  Recipient from header? (Y/N) N
  If N, ID qualifier and ID... EE02 IDE02

Action...................... 6    1. List carbon copy relationships
                                  2. Add a carbon copy relationship
                                  3. Browse a carbon copy relationship
                                  4. Change a carbon copy relationship
                                  5. Delete a carbon copy relationship
                                  6. Copy a carbon copy relationship
```

This information is displayed from the previous panel

Fill in the changes for these fields

```
M3860US              Copy a Carbon Copy Relationship

Requester account ID / user ID..... ACCT1    / USER3

From Relationship:
  Carbon copy type / data type..... R / E
  Partner (ID qual / ID)........... EE01 / IDE01
  Recipient (ID qual / ID)......... EE02 / IDE02
To Relationship:
  Carbon copy type (S/R)/ data type R / E
  Partner:
    All partners? (Y/N)............ N
    If N, ID qual / ID............. EI   / IDE01
  Recipient:
    Recipient from header? (Y/N)... N
    If N, ID qual / ID............. E2   / IDE02
          Recipient mailbox user... _____  or
          Recipient mailbox alias.. G TB1 ALIAS01
    If Y, table type and table name _ ___
```

When you request to copy an EDI carbon copy relationship, you must change one or more of the fields under the following headings:

■ "Carbon copy type"
■ "Partner"
■ "Recipient"

> NOTE: When you copy from one relationship to another, all fields, including criteria, that are not displayed on the copy panel are copied from the "From" relationship to the "To" relationship.

Creating and sending messages

You can create and send free-format messages while you are working with Information Exchange Administration Services. You can send these messages to users both inside and outside your account and system.

Each time you send a message, you incur Information Exchange charges. See the *Information Exchange Charges Reference* for more information.

NOTE: If you want to send a message you created outside Information Exchange Administration Services, you must use an Information Exchange interface program, such as an Expedite Licensed Program.

This chapter covers the following:

Understanding Information Exchange Administration Services messages

To send a message with Information Exchange Administration Services, you:

1. Address the message.

2. Specify who is paying the message charges and other descriptive information about the message.

3. Write the text of the message.

4. Send the message.

Looking at the information you need to send a message

The following fields provide the information needed to send a message.

■ **The sender's account ID and user ID**
This is your logon ID.

■ **The receiver**
The receiver can be:

 • An account ID and user ID (plus system ID if the user is on another system)
 • A distribution list
 • An alias reference

For more information on specifying the receiver, see "More on addressing the message" on page 197.

■ **Message charge**

This field:	Identifies who pays the charges:
1	Receiver pays all charges.
2	Sender and receiver split charges, if the receiver does not agree to pay.
3	Sender pays, if the receiver does not agree to pay OR to split the charges.
4	Sender and receiver split charges, if the receiver agrees. Otherwise, the sender pays.
5	Sender and receiver split the charges.
6	Sender pays all charges.

■ **Message name, Message sequence,** and **User message class**
These optional fields further identify the message.

For example, you may want to give the message a name if you think you might want access to a copy later. Or, you can use the message sequence to set up a cataloging system for your messages.

■ **Acknowledgments**
This field tells the system how you want to be notified when the receiver receives the message. If you do not want notification, leave the "Acknowledgments" field blank.

This code:	Means:
A	Purged
B	Accepted for delivery, delivered, or redirected
C	Accepted for delivery and purged
D	Delivered or redirected
E	Purged, delivered, or redirected
F	Accepted for delivery and either purged, delivered, or redirected
R	Accepted for delivery
Blank	No acknowledgment

■ **Retention period**
This field specifies the number of days to retain the message in the Information Exchange mailbox. The default and the maximum number of days are **system defined**.

The number must be between **1** and the maximum displayed by the system. The message is deleted if it is still in the mailbox after the retention period.

■ **Description for common data header**
This field is an optional description that Information Exchange Administration Services includes in the message's common data header.

You can type up to 79 characters.

When you send your message with Information Exchange Administration Services or an Expedite Licensed Program, information about your message appears in the common data header as the first message of the message group.

The common data header has additional information such as the record format, record length, data type, and data format. See "Looking at the common data header" on page 231 for more information about what is included in the common data header.

More on addressing the message

You can send a message to:

■ **A user on your system or another system using an account ID and user ID**
You may need to specify the 3-character system ID for some users.

■ **All the users on a distribution list**
If you address the message to a distribution list, Information Exchange Administration Services checks first for a private distribution list belonging to the sender. If the private distribution list is not found, Information Exchange Administration Services checks for an account-level distribution list belonging to the sender's account.

■ **A user on your system or another system using an alias**
You must know:

- The type of the alias table (**G** for global, **O** for organizational, or **P** for private)

- The 3-character name of the alias table

- The user's alias name

You must also have read access to the alias table.

More on message charges

You can choose one of the payment methods described below when you send mail through Information Exchange Administration Services.

This code:	Means:
1	The receiver pays all the charges for the messages.
2	The receiver pays all the charges. If the receiver does not agree to pay all the charges, the sender and the receiver split the charges.
3	The receiver pays all the charges. If the receiver does not agree to pay all the charges, the sender and the receiver split the charges. If the receiver does not agree to split the charges, the sender pays all the charges.
4	The sender and the receiver split the charges. If the receiver does not agree to split the charges, the sender pays all the charges.
5	The sender and the receiver split the charges.
6	The sender pays all the charges.

When you attempt to send your message, Information Exchange Administration Services verifies that you can communicate with the receiver you specified and that the message charges are correct. For more detail on message charges, see "Setting up stricter security" on page 10 and the *Information Exchange Charges Reference.*

Creating and sending a message

When you have decided how to address your message and how to specify charges, follow this path.

```
M0000US         Information Exchange Administration Services
                              Main Menu
                           System ID : SY1

Action 4    Work with one of the following:
                 1. Profiles
                 2. Alias tables
                 3. Distribution lists
                 4. Messages
                 5. Audit trails and session traces
```

Choose Action 4

```
M3000US                         Work with Messages

     Account ID.............  ACCT1
     User ID................  USER1
     Time zone..............  GMT
     Partner or alias........  __ / ____ / __  ____ or  ____ _____
     Begin date - time.......  __ / ____ / __ - __ : __    Date format - MM/DD/YY
     End date - time.........  __ / __ / __ - __ : __     Date format - MM/DD/YY
     User message class......  _____
     Exclude *SYSTEM**ERRMSG*  _            (Y or blank - action 1 only)

     Action.................  3   1. List inbound messages
                                  2. List outbound messages
                                  3. Send a message
                                  4. List archived message groups
                                  5. Work with audit trails and session traces
                                  6. Work with profiles
```

Fill in the receiver's ID here

Specify Y to exclude system error messages from your list of inbound messages

Choose Action 3

```
M3300US                          Send a Message

   Sender's Account ID - User ID......  ACCT1    - USER1

   Receiver's information (Fill in only one line)
      Sys ID - Account ID - User ID....  ___ - ACCT1    -USER4
      List name........................  _ - _____
      Alias type - table - name........  _ - ___ - _____

   Message information
      Message charge (required) (1-6)..  3
      Message name.....................  NAME
      Message sequence.................  ____
      User message class...............  CLASS1
      Acknowledgments
        (A/B/C/D/E/F/R/blank)..........  _
        Retention period (Max 030 )......  030
      Description for common data header (optional)
      _____


   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

The sender is always the logged on user

Specify who you want to receive the message

Fill in the rest of the information to further identify the message

If you are unsure how to fill in this panel, see "Looking at the information you need to send a message" on page 196 for more information.

When you finish filling in this panel, press Enter.

You see the panel like this one.

Type the text of your
message here ——————→

```
M3301US                      Send a Message                    Page 0001

  Receiver's information:  ACCT1    USER4

  Type the message text.  Press F8 and F7 to move forward and backward
  Press F3 or F4 to send.




  Command===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward  F12=Cancel
```
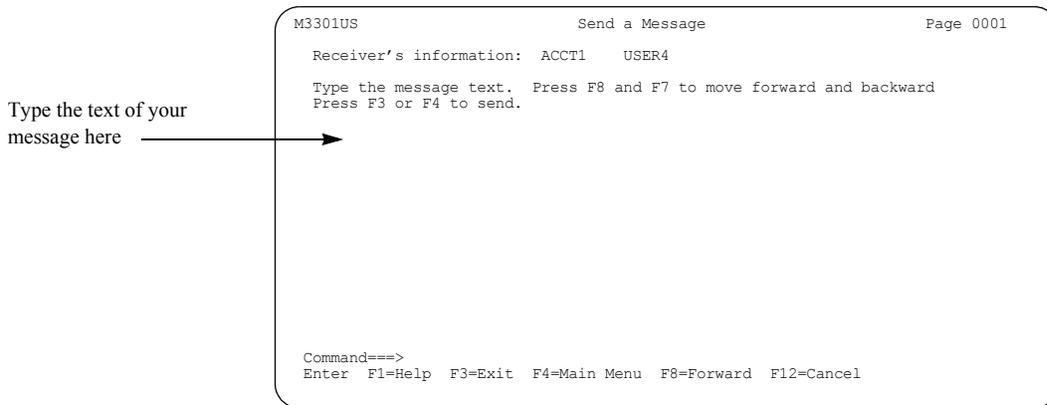
Your message can be more than one page long. Use F7 and F8 to move backward and forward through your text.

To send the message, press F3 or F4.

Managing mail for users

. . . .

You can help users manage their mail by:

- Looking at a list of inbound messages to find out if the mail you are waiting for has arrived or to ensure that there are no error messages.

- Looking at a list of outbound messages to find out if trading partners have picked up their mail or if a message has been sent.

- Deleting a mail item for a user.

- Looking at the common data header (CDH) to identify the type of message.

- Putting mail on hold and releasing the hold (inbound messages only).

This chapter covers the following:

Understanding mail management

With Information Exchange Administration Services, you work with inbound and outbound messages separately, choosing the particular messages you want to work with from a list.

You may be able to get all the information you need from the lists of inbound and outbound messages alone. If not, you can get information about the messages or read the text of the messages.

In addition to the text, Information Exchange Administration Services gives you two other kinds of information for each message:

- **Additional information**
  Additional information could include, for example, the sender's ID for an inbound message or the receiver's ID for an outbound message.

- **The common data header (CDH)**
  The CDH provides details (such as file name and carriage-return and line-feed options) that enable the receiving application to reconstruct a received message to its original format. System error messages do not have a CDH.

There is no charge for looking at this information.

Looking at the information in a message

Here is information in inbound and outbound messages. Unless specified, these fields apply to regular and carbon copy messages.

- **Sender (for an inbound message)**
  This is the ID of the user who sent the message.

- **Receiver (for outbound message)**
  This is the ID of the user to whom the message was sent.

- **User message class**
  This field may be used by the sender to indicate the type of data in the message. It can be used to indicate a general classification agreed upon by the users of Information Exchange.

- **Submitted date - time**
  This is the date and time the message was submitted to Information Exchange.

- **Expiration date**
  This is the date the message expires. It is determined by adding the retention period days to the date the message was created. The expiration date is displayed in the user's preferred date and time zone format.

- **Rcv ind**
  This field displays a status of:

Y	Receive in progress.
H	Held in mailbox.
F	Forced selective receive.
Blank	None of the above conditions.

NOTE: A parameter on the SEND command in Information Exchange and Expedite allows the message sender to specify that the message cannot be received with a 'blanket' RECEIVE command. The message receiver can only receive the messages that meet certain criteria. The criteria are:

- Sender ID (Sys ID / Account ID / User ID)
- User message class
- Message key

An F in this field indicates the message sender forces that selective receive criteria be specified for message delivery.

- **Arch ind**
This field displays a Y if this message was retrieved from archive.

- **CDH ind**
This field displays a Y if this message contains a common data header (CDH).

- **Message name / sequence**
These fields may be used by the sender to identify a message or group of messages, and to assign a message-control number to the message or to number messages within a message group.

- **With CDH: Number of msgs/total size**
This is the number of messages contained within the item and the total size in bytes, including the CDH.

- **Without CDH: Number of msgs/total size**
This is the number of messages contained within the item and the total size in bytes, excluding the CDH.

- **Priority/receive indicator**
This field displays the delivery priority and the receive indicator for the message.

The priority valid values are:

- **I** (immediate delivery)

- **P** (high priority delivery)

- **Blank** (normal delivery)

The receive indicator valid values are:

- "Receive in progress"

- "Forced selective receive"

- "Held in mailbox"

■ **Carbon copy type (carbon copy only)**
This field displays the type of carbon copy that generated the message. The valid values are:

- SEND CC (Send carbon copy)

- RECV CC (Receive carbon copy)

- SEND RED (Send redirect)

- RECV RED (Receive redirect)

■ **Partner's ID (carbon copy only)**
This field displays the partner ID. For inbound messages, this field only displays if the recipient is specified to pay at least one of the carbon copy message charges.

- For a send-side carbon copy, this is the ID of the receiver of the original message that caused the carbon copy to occur.

- For a receive-side carbon copy, this is the ID of the sender of the original message that caused the carbon copy to occur.

Looking at the information in the common data header

Here is the information in a CDH.

- **File ID**
  If the message was sent from a file, this is the system-dependent file name on the originating system. If the message was not sent from a file, this entry does not exist in the CDH.

- **File loc**
  This is the location of the file on the originating system. The value of this field depends on the type of system you are using.

If the system is:	The value indicates:
MVS	The device type and volume serial number
VM	The minidisk label
AIX	The path
PC	The drive or directory

- **Description**
  This is a free-format description of the message.

- **Record format**
  This is the record format of the file on the sending system.

- **Record length**
  This is the record length of the file on the sending system.

- **Record delimiter**
  This field contains the record delimiters the sending interface provides. When you receive data, your interface reconstructs the record format by using the information contained in this field.

This value:	Indicates that your interface:
CRLF	Delimits records with CRLF characters
LENGTH	Precedes records with a 2-byte length
EDI	Uses EDI delimiters when reconstructing records
NONE	Does not delimit records and is the default for data that is not in EDI format

■ **Data type**

This field describes the type of data in the message. The data can be either EBCDIC or binary. For non-PC devices, this field is primarily documentation. For PC devices, this field controls translation.

This value:	Indicates the message contains:
EBCDIC	EBCDIC data
BINARY	Binary data

■ **Data format**

This field describes the format of the data contained in the message.

The values are:

- X12
- UCS
- EDIFACT
- UN/TDI
- NOT EDI

■ **Translate type**

This field specifies the translation table the system uses when it translates data between ASCII and EBCDIC. If this entry does not exist in the CDH, the system uses the Information Exchange default when translating data.

■ **Sending system**

This field indicates the type of system sending the data. It enables the receiving interface to process received data differently based on the sending system type.

This code:	Means:
01	Unknown system type
10	expEDIte/PC
11	Expedite Base/2
12	Expedite Base/AIX
14	Expedite Base for SCO UNIX
15	Expedite Base/DOS
16	Expedite Base for SCO XENIX
17	Expedite Base for Windows
19	Expedite for Windows
20	expEDIte/MVS Host
21	Expedite Base/MVS
22	Information Exchange File Transfer Protocol
30	Mail Exchange
31	Expedite Base/VM
33	X.400 Gateway/SMTP Gateway
40	Expedite/Direct
44	EDI VAN Interconnect
61	EDI Server
62	MQSeries Services
71	Expedite Base/400
80	Expedite/CICS
90	Information Exchange Administration Services
91	Expedite/Async

■ **Sending version**

This field indicates the software version of the system sending the data.

■ **Sending code page**

The character representation of symbols, such as **$** and **#**, may have different meanings in different countries. This field provides the receiver with the intended meaning of the character.

■ **File date**

This field contains the date the file was last modified on the sending system.

■ **File time**
This field contains the time the file was last modified on the sending system.

■ **Unique ID**
This field contains an ID assigned by the sending system. You can use it to help identify the message.

■ **CR, LF, EOF Characters**
This field contains the carriage-return line-feed (CRLF) and end-of-file (EOF) characters you use when you want the file to be delimited by CRLF. Use this field when sending data to a PC that receives with a translate table other than the standard Information Exchange translate table. The default is "**X'0D0A1A**."

■ **EDI sender ID qual/sender ID**
The "EDI sender ID qual" contains the ID qualifier of the EDI sender. For X12 data, this field contains a 2-byte qualifier. For EDIFACT data, it contains a 4-byte qualifier. The field contains the entire qualifier. It is not used for UCS andUN/TDI data, because they do not have an ID qualifier.

The "EDI sender ID" contains the entire ID of the EDI sender.

■ **EDI receiver ID qual/receiver ID**
The "EDI receiver ID qual" contains the ID qualifier of the EDI receiver. For X12 data, this field contains a 2-byte qualifier. For EDIFACT data, it contains a 4-byte qualifier. The field contains the entire qualifier. It is not used for UCS and UN/TDI data, because neither have an ID qualifier.

The "EDI receiver ID" contains the entire ID of the EDI receiver.

■ **EDI interchange control ID**
This field contains the interchange control number for EDI data.

■ **Library owning account**
This field contains the owning account of the library that contains the data. The default is the sending user's account.

■ **Library name/member name**
This field contains the name of the library and the member name that contains the data.

■ **Software used for compression**
This field identifies the software used to compress the data.

■ **Version of software used**
This field identifies the version of the compression software.

■ **Compressed file name**
This field identifies the name of the file where the compressed data is stored.

Looking at different types of system messages

Information Exchange generates messages and sends them to the user's mailbox. These include information messages, such as acknowledgments, and error messages. The format of these messages is similar to that of messages sent from other users. On a list of inbound messages, a system-generated message always displays *SYSTEM* as the account ID. The user ID is one of the following:

- ***ADMIN****

  This identifies the message as containing informational, warning, or error messages from the administration mailbox.

- **ADMINGET**

  This identifies the message as output from a request to retrieve distribution lists or alias tables.

- ***AUDITS***

  This identifies the message as output from a request to retrieve audit information.

- ***ERRMSG***

  This identifies the message as containing either error messages or message acknowledgments.

- ***EVENTS***

  This identifies the message as output from a request to retrieve session trace information.

- ***INVTRK***

  This identifies the message as a system-generated acknowledgment for a tracked invoice. This type of message is not generated by all Information Exchange systems.

- ***LSTRSP***

  This identifies the message as containing output from a regular LIST VERIFY request.

- ***PRBRSP***

  This identifies the message as containing the output from a request to validate address and payment resolution.

- ***SMTPGW***

  This identifies a message generated by the SMTP Gateway. It will contain a delivery notification.

- ***TSTMSG***

  This identifies the message as containing test messages the user requested from Information Exchange.

- ****X400****

  This identifies the message as containing Delivery receipts (DRs) or Non-delivery reports, (NDRs) or EDI notifications (EDINs) for X.400 messages.

How Information Exchange processes mail tasks

With Information Exchange, most processes required to complete a specific task or action are performed *synchronously.* This means the processes are started immediately and completed within a regular or predictable time frame. Other processes, which can be more time-consuming, are performed *asynchronously.* This means that the processes might have to wait in a processing queue before they are completed.

Information Exchange performs several message-related processes asynchronously. Therefore, if you are closely watching messages, it might seem that they are being delayed. Information Exchange performs the following message processes asynchronously:

■ **Message routing**

After a user sends a message and it is accepted by Information Exchange, Information Exchange starts an asynchronous process that:

• Validates the message routing
• Creates the receiver's mailbox record
• Creates the message audit records

Messages to users attached to another system must be processed by both the sending and receiving Information Exchange systems. This cannot happen if the other system is not functioning, or if the link between the systems has failed. Also, unlike local system message routing, routing to a remote system requires the transfer of the entire message. This requires more time for larger messages.

■ **Message delivery**

After a user receives a message from the Information Exchange mailbox, Information Exchange starts an asynchronous process that:

• Updates the audit records

Because this is an asynchronous process, a message that is no longer in the user's mailbox might still seem to be in the mailbox according to the audit record.

• Builds the message archive

For more information on archived messages, see Chapter 16, "Working with archived messages."

Sometimes it might seem that a long time lapses between the time a message is sent and the time it appears in the receiver's mailbox. This can happen if a sender is using one of the interfaces with checkpoint-level recovery, such as Expedite Base/2, and the sending session fails. In this event, the user may start another session the following day (which is a reset of the previous day's failed session). This would cause the message to be committed much later than when the sending was originally started.

Looking at a list of inbound and outbound messages

You may want to look at a list of inbound messages, for example, to find out if mail you are waiting for has arrived or to ensure that there are no error messages. You may want to look at a list of outbound messages, for example, to find out if a trading partner has picked up their mail or if a message was sent.

You can only look at a list of outbound messages sent to a particular trading partner on your local system.

You can look at a list of inbound messages for a specified account ID and user ID, or for all the users in an account by specifying a question mark (**?**) in the user ID field.

NOTE: You can also specify not to display messages from *SYSTEM**ERRMSG* when selecting to view your inbound mail.

For both inbound and outbound messages, you can narrow the list down by specifying a search criteria. You can select all messages submitted between the begin and end date times you specify, as well as messages with a specific user message class you specify.

This example features inbound messages, but you follow the same steps to get a list of outbound messages. For outbound messages, you must specify a partner.

To list inbound messages, follow this path.

```
M0000US          Information Exchange Administration Services
                              Main Menu
                            System ID : SY1

   Action 4     Work with one of the following:
                   1. Profiles
                   2. Alias tables
                   3. Distribution lists
                   4. Messages
```

Choose Action 4

You see a panel like this one.

If you want to view the times in another time zone, fill in this field

You can use these fields as search fields

Choose Action 1 for inbound messages

```
M3000US                        Work with Messages

   Account ID.............. ACCT1
   User ID................ USER1
   Time zone.............. EST
   Partner or alias........ __ / __ / __ - __ : __    or _____
   Begin date - time....... __ / __ / __ - __ : __    Date format - MM/DD/YY
   End date - time......... __ / __ / __ - __ : __    Date format - MM/DD/YY
   User message class...... _____
   Exclude *SYSTEM**ERRMSG* _            (Y or blank - action 1 only)

   Action................. 1   1. List inbound messages
                               2. List outbound messages
                               3. Send a message
```

```
M3100US                    List Inbound Messages

   Account ID.............. ACCT1
   User ID................ USER1

   Codes (multiple selection)
     D = Delete message   H = View common data header    M = Hold in mailbox
     R = Remove hold      S = See additional information  V = View text (BILLABLE)

         --------- Sender ---------   User msg --- Submitted ---- Rcv  Arch  CDH
   Code  Sys ID  Account   User ID   class     Date     Time     ind  ind   ind
                 *SYSTEM*  *ERRMSG*            02/03/99 13:16:29
     _           *SYSTEM*  *AUDITS*  #SAUDIT   02/03/99 16:15:37
     _           ACCT1     USER4     AUDIT03   02/06/99 11:20:12  F          Y
     _           ACCT1     USER4     CLASS1    02/06/99 13:00:55  Y          Y
     _           ACCT1     USER4     CLASS2    02/06/99 13:16:30       Y     Y
     _           ACCT1     USER4     CLASS3    02/06/99 13:36:01  H    Y     Y
```

The "Rcv ind" can indicate one of the following:

Y	Receive in progress.
H	Held in mailbox.
F	Forced selected receive.
blank	None of the above conditions.

NOTE: A status of Y in the "Rcv ind" field does not apply to outbound messages.

The "Arch ind" displays as Y, if the message was retrieved from archive.

The "CDH ind" displays as Y, if the message has a CDH.

Looking at inbound and outbound messages for a cluster user ID

You can select to list inbound or outbound messages for a cluster mailbox user. On the Work with Messages panel, type the child user ID in the "User ID" field to query each child's mailbox independently, or you can type the parent user ID to select all the messages in each child's mailbox.

On the "List Inbound Messages" or "List Outbound Messages" panels, you cannot specify a child user ID in the "Partner or alias" field.

To list inbound messages, follow this path.

You **can** fill in a cluster parent or a cluster child user ID here

You **cannot** fill in a cluster child here

Choose Action 1

```
M3000US                       Work with Messages

  Account ID..............  ACCT1
  User ID.................  USER1
  Time zone...............  EST
  Partner or alias........  ___ ___ ___ ___ ___ ___  or  _____
  Begin date - time.......  __ / __ / __ - __ : __    Date format - MM/DD/YY
  End date - time.........  __ / __ / __ - __ : __    Date format - MM/DD/YY
  User message class......  _____
  Exclude *SYSTEM**ERRMSG*  _            (Y or blank - action 1 only)

  Action.................  1   1. List inbound messages
                               2. List outbound messages
                               3. Send a message
```

The child user ID displays here

Each new child user ID starts a new panel

```
M3100US                       List Inbound Messages

  Account ID..............  ACCT1
  User ID.................  USER102

  Codes (multiple selection)
    D = Delete message   H = View common data header    M = Hold in mailbox
    R = Remove hold      S = See additional information V = View text (BILLABLE)


         --------- Sender ---------  User msg --- Submitted ----  Rcv  Arch  CDH
  Code  Sys ID  Account   User ID  class    Date      Time      ind  ind   ind
                ACCT1     USER3    CLASS1   02/08/99  08:20:13   Y          Y
    _           ACCT1     USER3    CLASS1   02/09/99  09:30:18   F    Y     Y
    _           ACCT1     USER3    CLASS2   02/10/99  10:25:12              Y
    _           ACCT1     USER3             02/11/99  11:15:32   H
    _           ACCT1     USER3             02/12/99  12:54:18   F
    _           ACCT1     USER3             02/13/99  01:30:18              Y
```

NOTE: For cluster user IDs, the child user ID is the mailbox owner.

When working with outbound messages, you must specify a partner ID. The ID cannot be a cluster child user ID. To list outbound messages, follow this path.

You can fill in **only** a cluster parent user ID here

You **cannot** fill in a cluster child here

Choose Action 2

```
M3000US                          Work with Messages

   Account ID.............  ACCT1
   User ID................  USER1
   Time zone..............  EST
   Partner or alias........  _____  or  ____
   Begin date - time.......  __ / __ / __ - __ : __   Date format - MM/DD/YY
   End date - time........  __ / __ / __ - __ : __   Date format - MM/DD/YY
   User message class......  _____
   Exclude *SYSTEM**ERRMSG*  _          (Y or blank - action 1 only)

   Action.................  2   1. List inbound messages
                                2. List outbound messages
                                3. Send a message
```

This list reflects the outbound messages for all the cluster children

The parent user ID displays here

```
M3200US                       List Outbound Messages

   Account ID.............  ACCT1
   User ID................  USER1

   Codes (multiple selection):
     D = Delete message                 H = View the common data header
     S = See additional information     V = View message text   (BILLABLE)

          ---- Receiver -----   User msg   --- Submitted ---- Rcv  Arch CDH
   Code   Account   User ID    class      Date      Time     ind  ind  ind
     _    ACCT1     USER3      CLASS1     02/08/99  09:21:14            Y
     _    ACCT1     USER3      CLASS1     02/09/99  10:31:19  F    Y    Y
     _    ACCT1     USER3      CLASS2     02/10/99  11:26:13            Y
     _    ACCT1     USER3                 02/11/99  12:16:33  H
     _    ACCT1     USER3                 02/12/99  01:55:19  F
     _    ACCT1     USER3                 02/13/99  02:31:19            Y
```

The "Rcv ind" can indicate one of the following:

Y	Receive in progress.
H	Held in mailbox.
F	Forced selective receive.
blank	None of the above conditions.

NOTE: A status of Y in the "Rcv ind" field does not apply to outbound messages.

The "Arch ind" displays as Y, if the message was retrieved from archive.

The "CDH ind" displays as Y, if the message has a CDH.

Looking at information about a message

Information Exchange Administration Services gives you two types of additional information about messages:

■ The common data header (CDH), if available

■ Other information, such as the message name, message sequence, and the message key

> NOTE: There is no charge for looking at this information.

You can look at the CDH or other information about the message from any of the message list panels.

Looking at the common data header

To look at the CDH, follow this path.

```
M0000US          Information Exchange Administration Services
                                 Main Menu
                              System ID : SY1

   Action 4     Work with one of the following:
                    1. Profiles
                    2. Alias tables
                    3. Distribution lists
                    4. Messages
```

Choose Action 4

```
M3000US                      Work with Messages

   Account ID.............. ACCT1
   User ID................. USER1
   Time zone............... EST
   Partner or alias........ ___ ACCT1___ USER3___ or _____
   Begin date - time....... __ / __ / __ - __ : __   Date format - MM/DD/YY
   End date - time......... __ / __ / __ - __ : __   Date format - MM/DD/YY
   User message class...... _____
   Exclude *SYSTEM**ERRMSG* _          (Y or blank - action 1 only)

   Action................. 2   1. List inbound messages
                               2. List outbound messages
                               3. Send a message
```

If you want to view the times in another time zone, fill in this field

You can use these fields as search fields

Choose Action 1 for inbound messages or Action 2 for outbound messages

```
M3200US                    List Outbound Messages

   Account ID.............. ACCT1
   User ID................. USER1

   Codes (multiple selection):
     D = Delete message                 H = View the common data header
     S = See additional information     V = View message text  (BILLABLE)

          ---- Receiver -----   User msg   ---- Submitted ---- Rcv  Arch  CDH
   Code  Account    User ID     class      Date       Time     ind  ind   ind
    H    ACCT1      USER3       CLASS1     02/08/99   11:02:18             Y
    _    ACCT1      USER3                  02/08/99   11:05:38  F    Y      Y
    _    ACCT1      USER3                  02/08/99   11:08:10       Y      Y
    _    ACCT1      USER3                  02/08/99   11:10:20  H           Y
    _    ACCT1      USER3                  02/08/99   11:15:30  F           Y
    _    ACCT1      USER3                  02/08/99   11:30:40             Y
```

Fill in H next to each message for which you want to look at the CDH

The information in the CDH is the same for both inbound and outbound messages, although there are additional fields available for inbound messages.

Here is an example of the CDH for an outbound message. The CDH has two panels of information.

```
M3203US          Common Data Header for the Outbound Message   (Panel 1 of 2)

Account ID.............   ACCT1
User ID................   USER1

Action.................  _  D = Delete message
                            S = See additional information
                            V = View message text (BILLABLE)

File ID.....  FILEID
File loc....  EILELOCATION
Description.  DESCRIPTION FOR FILE


Record format. F      Record length... 00079    Record delimiter.... NONE
Data type..... EBCDIC  Data format..... NOT EDI  Translate type...... IE
Sending system 90      Sending version. 4        Sending code page...
File date..... 02/08/99 File time....... 11:02:18 Unique ID........... 95415178



Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward  F12=Cancel
```

The first panel shows some of the CDH details

```
M3204US           Common Data Header for the Outbound Message  (Panel 2 of 2)

Account ID.............   ACCT1
User ID................   USER1

Action.................  _  D = Delete message
                            S = See additional information
                            V = View message text (BILLABLE)

CR, LF, EOF Characters............
EDI sender ID qual / sender ID....          /
EDI receiver ID qual / receiver ID        /
EDI interchange control ID........
Library owning account...........   ACCT1
Library name / member name........  LIB1          / MEMBER1
Software used for compression.....
Version of software used.........
Compressed file name


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward  F12=Cancel
```

The second panel shows the rest of the CDH information

If the data is EDI data and the sending interface is an Expedite Licensed interface program, these fields are filled in:

■ The EDI sender ID qualifier and sender ID
■ The EDI receiver ID qualifier and receiver ID
■ The EDI interchange control ID

If the message was retrieved from a library, these fields are filled in:

■ The ID of the account that owns the library this message came from
■ The library that contains this message and the name of the member this message came from

For more information on the data in the CDH, see "Looking at the information in a message" on page 202.

Looking at other information

In addition to the text and the CDH, the message includes other information such as the sender (for an inbound message) and the receiver (for an outbound message).

To look at this type of information, follow this path.

```
M0000US          Information Exchange Administration Services
                            Main Menu
                         System ID : SY1

Action 4    Work with one of the following:
               1. Profiles
               2. Alias tables
               3. Distribution lists
               4. Messages
```

Choose Action 4

If you want to view the times in another time zone, fill in this field

You can use these fields as search fields

Choose Action 1 for inbound messages and Action 2 for outbound messages

```
M3000US                       Work with Messages

   Account ID..............  ACCT1
   User ID.................  USER1
   Time zone...............  EST
   Partner or alias........  _____ or  _____
   Begin date - time.......  __ / __ / __ - __ : __   Date format - MM/DD/YY
   End date - time.........  __ / __ / __ - __ : __   Date format - MM/DD/YY
   User message class......  _____
   Exclude *SYSTEM**ERRMSG*  _          (Y or blank - action 1 only)

   Action.................  1   1. List inbound messages
                                2. List outbound messages
                                3. Send a message
```

You see a panel like this one.

```
M3100US                      List Inbound Messages

   Account ID..............  ACCT1
   User ID.................  USER1

   Codes (multiple selection)
     D = Delete message    H = View common data header     M = Hold in mailbox
     R = Remove hold       S = See additional information  V = View text (BILLABLE)

        --------- Sender ---------   User msg  --- Submitted ----  Rcv  Arch  CDH
   Code  Sys ID  Account   User ID   class     Date      Time      ind  ind   ind
   S             ACCT1     USER4     CLASS1    02/09/99  11:15:13  N          Y
                 ACCT1     USER4     CLASS1    02/09/99  11:20:18  Y          Y
   _             ACCT1     USER4     CLASS2    02/09/99  11:25:12  F
   S             ACCT1     USER4               02:09:99  12:20:32  H
   _             ACCT1     USER4               02/09/99  19:54:18  F    Y     Y
   _             ACCT1     USER4               02/09/99  20:30:18  Y    Y
```

Fill in S next to each message for which you want to see additional information

Here is an example of additional information about an inbound message.

```
M3101US                 Information about the Inbound Message

   Account ID.............  ACCT1
   User ID................  USER1

   Action... _   D = Delete message   H = View CDH        M = Hold in mailbox
                 R = Remove hold       V = View text (BILLABLE)

   Sender's ID...........................   ACCT1    USER4
   User message class....................  CLASS1
   Submitted date and time...............  02/09/99 11:15:13
   Expiration date.......................  04/09/99
   Message name / sequence...............  MESSAGE1 / 00001
   Message key...........................  MSKEY001
   With CDH: Number of msgs / total size... 0000000002 / 0000000375
   Without CDH: Number of msgs / total size 0000000001 / 0000000316
   Priority / receive indicator...........   /
   Carbon copy type......................  SEND
   Partner's ID..........................  ACCT1     / USER2


   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

These fields give you additional information about the message

Here is an example of additional information about an outbound message.

```
M3201US               Information about the Outbound Message

   Account ID.............  ACCT1
   User ID................  USER1

   Action.................  _  D = Delete message
                               H = View CDH
                               V = View text  (BILLABLE)

   Receiver's ID.........................   ACCT1    USER3
   User message class....................  CLASS1
   Submitted date and time...............  02/15/99   07:48:35
   Expiration date.......................  04/15/99
   Message name / sequence...............  MESSAGE1 / 00001
   With CDH: Number of msgs / total size... 0000000002 / 0000000377
   Without CDH: Number of msgs / total size 0000000001 / 0000000318
   Priority..............................
   Carbon copy type......................  RECEIVE
   Partner's ID..........................      ACCT1    USER2


   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

These fields give you additional information about the message

These fields display for messages that result from a carbon copy or a redirect:

■ **"Carbon copy type"**

■ **"Partner's ID"**

   This field displays the partner. For inbound messages, this field only displays if the recipient of the carbon copy message is specified to pay at least one of the carbon copy charges.

For additional information about the message fields, see "Looking at the information in a message" on page 202.

Looking at the text of a message

To look at the message text from any of the message list panels, type **v** for "View message text." This example features the list of inbound messages, but the "View message text" choice is available for outbound messages as well.

NOTE: You will be billed for viewing the text of a message.

To look at the text of a message, follow this path.

```
M0000US           Information Exchange Administration Services
                                  Main Menu
                               System ID : SY1

Action 4     Work with one of the following:
                  1. Profiles
                  2. Alias tables
                  3. Distribution lists
                  4. Messages
```

Choose Action 4

If you want to view the times in another time zone, fill in this field

You can use these fields as search fields

Choose Action 1 for inbound messages or Action 2 for outbound messages

```
M3000US                          Work with Messages

    Account ID.............  ACCT1
    User ID................  USER1
    Time zone..............  EST
    Partner or alias........      ACCT1   USER3    or   ____
    Begin date - time.......  __ / __ / __ - __ : __    Date format - MM/DD/YY
    End date - time.........  __ / __ / __ - __ : __    Date format - MM/DD/YY
    User message class......  _____
    Exclude *SYSTEM**ERRMSG*  _          (Y or blank - action 1 only)

    Action.................  1   1. List inbound messages
                                 2. List outbound messages
                                 3. Send a message
```

You see a panel like this one.

```
 M3100US                      List Inbound Messages

 Account ID.............  ACCT1
 User ID................  USER1

 Codes (multiple selection)
   D = Delete message   H = View common data header     M = Hold in mailbox
   R = Remove hold      S = See additional information  V = View text (BILLABLE)

          ----- Sender ------   User msg  --- Submitted ----   Rcv   Arch   CDH
   Code   Account   User ID     class     Date      Time       ind   ind    ind
   V      ACCT1     USER3       CLASS1    02/08/99  08:20:13   Y            Y
   _      ACCT1     USER3       CLASS1    02/09/99  09:30:18   F     Y      Y
   V      ACCT1     USER3       CLASS2    02/10/99  10:25:12                Y
   _      ACCT1     USER3                 02/11/99  11:15:32
   _      ACCT1     USER3                 02/12/99  12:54:18   F
   _      ACCT1     USER3                 02/13/99  01:30:18                Y
```

Fill in V next to each message for which you want to view the text

Depending on the message, you may have to select the text format to look at the message text. If the message meets all of these conditions, Information Exchange Administration Services displays the Format Selection for Viewing panel before you see the message text:

- The message has a CDH
- The record format in the CDH is a fixed length
- The record length in the CDH is not equal to 79 or zero
- The data format in the CDH is "NOT EDI"

Here is an example of the Format Selection for Viewing panel.

```
M9999US                    Format Selection for Viewing

  Account ID.............  ACCT1
  User ID................  USER1

  The data you are viewing has a record length of 02345 and the panel
  displays 79 characters per line.

  If the data is viewed as is, wrapping will occur.
  Action................. _  W = view in Wrapped format
                             O = view One record per line



  Warning - The record length is greater than 2340.
  Only the first 2340 characters will be displayed.
```

Fill in W or O to specify how you want to see the text

For more information on selecting the format for viewing, see "Handling the format selection for viewing" on page 28.

Here is an example of the View Message Text panel.

You can fill in a page number here to move directly to that page

```
M3102US               View Message Text       Page    000001 of 000002
                                               Columns  00001 -   00079
  Message text sent to
    Account ID / User ID      ACCT1   / USER4     This is a BILLABLE function

  The project meeting originally scheduled for today at 10:00 a.m. has been
  rescheduled for tomorrow at 2:00 p.m.

  The agenda has been changed to the following:
  1. Temporary assignment changes
  2. Vacation schedules
```

You are billed the first time you view each panel in the message

NOTE: You are charged only for the first time you view each panel of data. However, if you leave this message and then choose to view the text again, you are charged again the first time you view each panel.

There is no charge for viewing messages from ID *SYSTEM* *ERRMSG*, *SYSTEM* *ADMIN**, *SYSTEM* **X.400**, or *SYSTEM**SMTPGW*. See the *Information Exchange Charges Reference* for more information.

Placing a message on hold

When you place a message on hold in the mailbox, even though the message is not a candidate for receive processing, it can be deleted from the mailbox. You must remove the hold for the message to be received. Only inbound messages can be held in the mailbox.

NOTE: If you are an alternate administrator, you should see "Delegating authority to alternate administrators" on page 8 to see if your administrator type has the authority to place messages on hold.

To place a message on hold, follow this path.

```
M0000US          Information Exchange Administration Services
                                 Main Menu
                               System ID : SY1

 Action 4     Work with one of the following:
                 1. Profiles
                 2. Alias tables
                 3. Distribution lists
                 4. Messages
```

Choose Action 4

```
M3000US                          Work with Messages

   Account ID.............  ACCT1
   User ID................  USER1
   Time zone..............  EST
   Partner or alias........     ACCT1   USER3    or ____
   Begin date - time.......  __ / __ / __ - __ : __   Date format - MM/DD/YY
   End date - time.........  __ / __ / __ - __ : __   Date format - MM/DD/YY
   User message class......
   Exclude *SYSTEM**ERRMSG*  _           (Y or blank - action 1 only)

   Action.................  1   1. List inbound messages
                                2. List outbound messages
                                3. Send a message
```

Choose Action 1

You see a panel like this one.

```
M3100US                     List Inbound Messages

  Account ID.............  ACCT1
  User ID................  USER102

  Codes (multiple selection)
   D = Delete message   H = View common data header     M = Hold in mailbox
   R = Remove hold      S = See additional information  V = View text (BILLABLE)

           ----- Sender ------  User msg  --- Submitted ----  Rcv   Arch  CDH
   Code    Account    User ID   class     Date      Time      ind   ind   ind
    M      ACCT1      USER3     CLASS1    02/08/99  08:20:13               Y
           ACCT1      USER3     CLASS1    02/09/99  09:30:18   F     Y     Y
    M      ACCT1      USER3     CLASS2    02/10/99  10:25:12               Y
    _      ACCT1      USER3               02/11/99  11:15:32
    _      ACCT1      USER3               02/12/99  12:54:18   F
    _      ACCT1      USER3               02/13/99  01:30:18               Y
```

Fill in M next to each message you want to hold in the mailbox

Find the messages you want to hold in the mailbox and type **m** next to them. You can hold more than one message at a time.

Press F3 or F4 to hold the selected message(s) and leave the panel.

NOTE: If the "Rcv ind" field contains a Y, the message is in the process of being received and cannot be held in the mailbox.

Removing the hold from a message

When you place a message on hold in the mailbox, you must remove the hold for the message to be received. Messages that have been held in the mailbox will display a "Rcv Ind" of **H** on the List Inbound Messages panel.

NOTE: If you are an alternate administrator, you should see "Delegating authority to alternate administrators" on page 8 to see if your administrator type has the authority to remove messages from hold.

To remove the hold from a message, follow this path.

```
M0000US          Information Exchange Administration Services
                              Main Menu
                           System ID : SY1

  Action 4    Work with one of the following:
                  1. Profiles
                  2. Alias tables
                  3. Distribution lists
                  4. Messages
```

Choose Action 4

```
M3000US                         Work with Messages

   Account ID..............  ACCT1
   User ID.................  USER1
   Time zone...............  EST
   Partner or alias........       ACCT1    USER3    or  ____
   Begin date - time.......  __ / __ / __ - __ : __     Date format - MM/DD/YY
   End date - time.........  __ / __ / __ - __ : __     Date format - MM/DD/YY
   User message class......
   Exclude *SYSTEM**ERRMSG*  _            (Y or blank - action 1 only)

   Action.................  1    1. List inbound messages
                                 2. List outbound messages
                                 3. Send a message
```

Choose Action 1

You see a panel like this one.

```
M3100US                        List Inbound Messages

   Account ID..............  ACCT1
   User ID.................  USER102

   Codes (multiple selection)
    D = Delete message   H = View common data header     M = Hold in mailbox
    R = Remove hold      S = See additional information   V = View text (BILLABLE)

            ----- Sender ------  User msg  --- Submitted ----   Rcv   Arch  CDH
    Code    Account   User ID    class     Date      Time       ind   ind   ind
    R       ACCT1     USER3      CLASS1    02/08/99  08:20:13    H           Y
            ACCT1     USER3      CLASS1    02/09/99  09:30:18    F     Y     Y
    R       ACCT1     USER3      CLASS2    02/10/99  10:25:12    H           Y
    _       ACCT1     USER3                02/11/99  11:15:32
    _       ACCT1     USER3                02/12/99  12:54:18    F
    _       ACCT1     USER3                02/13/99  01:30:18                Y
```

Fill in R next to each message you want to remove from hold

Find the messages you want to remove the hold from and type **r** next to them. You can remove the hold from more than one message at a time.

Press F3 or F4 to remove the hold from the selected message(s) and leave the panel.

Deleting a message

When you delete a message, all information about the message is deleted from Information Exchange Administration Services, including the text, the CDH, and other information.

NOTE: If you are an alternate administrator, you should see "Delegating authority to alternate administrators" on page 8 to see if your administrator type has the authority to delete messages.

The example below shows an inbound message, but the process is the same for both inbound and outbound messages.

```
M0000US          Information Exchange Administration Services
                              Main Menu
                           System ID : SY1

 Action 4     Work with one of the following:
                    1. Profiles
                    2. Alias tables
                    3. Distribution lists
                    4. Messages
```

Choose Action 4

If you want to view the times in another time zone, fill in this field

You can use these fields as search fields

Choose Action 1 for inbound messages or Action 2 for outbound messages

```
M3000US                       Work with Messages

   Account ID..............  ACCT1
   User ID.................  USER1
   Time zone...............  EST
   Partner or alias........       ACCT1   USER3    or  ____
   Begin date - time.......  __ / __ / __ - __ : __   Date format - MM/DD/YY
   End date - time.........  __ / __ / __ - __ : __   Date format - MM/DD/YY
   User message class......
   Exclude *SYSTEM**ERRMSG*  _            (Y or blank - action 1 only)

   Action..................  1   1. List inbound messages
                                 2. List outbound messages
                                 3. Send a message
```

You see a panel like this one.

```
M3100US                      List Inbound Messages

   Account ID..............  ACCT1
   User ID.................  USER102

   Codes (multiple selection)
    D = Delete message   H = View common data header      M = Hold in mailbox
    R = Remove hold      S = See additional information  V = View text (BILLABLE)

            ----- Sender ------  User msg  --- Submitted ----  Rcv  Arch  CDH
   Code     Account   User ID    class     Date      Time      ind  ind   ind
    D       ACCT1     USER3      CLASS1    02/08/99  08:20:13   Y          Y
            ACCT1     USER3      CLASS1    02/09/99  09:30:18   F     Y    Y
    D       ACCT1     USER3      CLASS2    02/10/99  10:25:12              Y
    _       ACCT1     USER3                02/11/99  11:15:32
    _       ACCT1     USER3                02/12/99  12:54:18   F
    _       ACCT1     USER3                02/13/99  01:30:18              Y
```

Fill in D next to each message you want to delete

Find the messages you want to delete and type **d** next to them. You can delete more than one message at a time. You will not receive a delete confirmation message.

Press F3 or F4 to delete the selected message(s) and leave the panel.

NOTE: If the "Rcv ind" field contains a Y, the message is in the process of being received and cannot be deleted.

Displaying the cluster child user ID for a trading partner

Use this option to determine which child user ID mailbox receives mail from a specific trading partner.

On the Work with Messages panel, Information Exchange Administration Services displays a message that informs you which child user ID receives mail from a particular trading partner. To display this information, do the following:

Fill in the parent account ID and user ID here

Fill in the trading partner information here

Choose Action 7

A message displays the child user ID

```
M3000US                    Work with Messages

   Account ID..............   ACCT1
   User ID.................   USER1
   Time zone...............   EST
   Partner or alias........   ___ ACCT2    USER3      or ____
   Begin date - time.......   __ / __ / __ - __ : __   Date format - MM/DD/YY
   End date - time.........   __ / __ / __ - __ : __   Date format - MM/DD/YY
   User message class......   _____
   Exclude *SYSTEM**ERRMSG*   _          (Y or blank - action 1 only)

   Action.................   7   1. List inbound messages
                                 2. List outbound messages
                                 3. Send a message
                                 4. List archived message groups
                                 5. Work with audit trails and session traces
                                 6. Work with profiles
                                 7. Show cluster child ID for trading partner

0389 The cluster child ID for this trading partner is ACCT.USER102
Command ===>
Enter  F1=Help  F3=Main Menu  F4=Main Menu
```

When you have completed the requested information on this panel, press Enter. One of the following messages displays, based on the user ID type entered on the panel.

If the user ID:	This message displays:
Is a parent user ID	The cluster child ID for this trading partner is ACCOUNT.USERID
Is a child user ID	ACCOUNT.USERID is a cluster child ID. The cluster parent ID has been substituted. Press Enter to continue.
Is not a cluster user ID	This action can only be performed for cluster mailbox users. Enter a cluster parent user ID.

Working with archived messages

The message archive is a convenient place to store messages you want to retain in Information Exchange for some time after the message is received from the mailbox. In the archive, messages are stored in message groups. That way, messages can be arranged efficiently according to project or team or any way that meets the needs of your company.

This chapter covers the following:

Understanding archived messages

You can request to have Information Exchange place a message in archive when you receive it or when requested in a receive carbon copy redirect relationship. You cannot choose to archive messages you send.

An archive message group consists of from one to many messages with the same archive reference ID. The reference ID for a group is specified when the message is received from the mailbox or in the receive carbon copy redirect relationship that requests archiving.

ATTENTION: Archiving is a billable function. Archive charges are based on the message size and the number of days the message remains in archive. Charges are incurred when the message is deleted or purged from archive.

How to use message groups to organize the archive

When a message is placed in archive through a receive request and no archive group reference ID is specified, the system defaults the archive group reference ID to the session access key. When a message is placed in archive due to a receive carbon copy redirect relationship and no archive group reference ID is specified, the system default of %CARBON% is used.

If you want to assign an archive group reference ID, other than the default, you may want to use a naming convention that relates to the way the messages are received. If you do, the process of finding messages to be retrieved from archive later on becomes easier.

You should avoid using the same archive group reference ID for all your receives. This will avoid lengthy searches through multiple panels in Information Exchange Administration Services when you are ready to retrieve messages from the archive.

How the user profile affects archiving

There are two fields in the user profile that affect archiving:

- "Forced archiving?"
- "Archive days"

The maximum number of days an archive is kept is determined by the value specified in the "Archive days" field in the user's profile.

There are several ways to cause a message to be archived.

- If "Forced archiving?" is set to Y when a user receives a message, it is archived.
  If an archive group reference ID is specified in the Receive command, the message is archived using the specified archive group reference ID.

  If an archive group reference ID is not specified, the session access key is used as the archive group reference ID when archiving the message.

- If "Forced archiving?" is set to N, a message is archived only if an archive group reference ID is specified when the Receive Message command is issued or if archiving is requested in a receive carbon copy redirect relationship.

  In this case, the message is archived only if the "Archive days" field contains a value greater than zero.

Here are some tips:

■ If the "User message class" field is used in the selection criteria of the receive command, you may want to consider using the "User message class" as the group reference ID.

■ If you select messages to be received by the sender's ID, you may want to use a group reference ID that relates to the sender's ID. In that way, you can group all messages received from the same sender.

Looking at the information in archived messages and archived message groups

Here is the information in an archive messages.

■ **Account ID**
This is the mailbox owner's account ID.

■ **User ID**
This is the mailbox owner's user ID

■ **Archive reference**
This is the archive reference ID specified when the message was received. If no archive reference ID was specified, then this is the session ID assigned by Information Exchange.

For more information, see "How the user profile affects archiving" on page 226.

■ **First message date**
This is the date the first message in the message group was placed in archive.

■ **First message time**
This is the time the first message in the message group was placed in archive.

■ **Last message date**
This is the date when the last message in the group was placed in archive.

■ **Last message time**
This is the time when the last message in the group was placed in archive.

■ **Messages in group**
This is the number of messages in the archived message group.

■ **EDI sender ID qual/sender ID**
This field displays the EDI sender ID qual/sender ID from the CDH, if present. Otherwise, this field displays the system ID (if applicable), and the account ID and user ID of the archived message sender.

■ **Sent date and time**
This is the date and time the archived message was sent.

■ **User msg class**
This is the user message class specified by the message sender.

■ **EDI control ID or message name**
This field displays the EDI interchange control ID from the CDH, if present. Otherwise, this field displays the message name specified by the message sender.

■ **CDH IND**
This is the common data header indicator. If a message contains a CDH, then a Y displays under the indicator heading on the List Archived Messages panel.

Looking at archived message groups

You can look at a list of all the message groups for a specified account ID and user ID, or for all the users in an account by typing an account ID and typing a question mark **(?)** in the "User ID" field.

You can narrow your list by selecting only the messages sent between the begin and end date and time specified on the panel.

NOTE: For cluster user IDs, the parent user ID owns the archive message group.

To look at an archived message group, follow this path.

```
M0000US          Information Exchange Administration Services
                              Main Menu
                           System ID : SY1

  Action 4     Work with one of the following:
                 1. Profiles
                 2. Alias tables
                 3. Distribution lists
                 4. Messages
```

Choose Action 4

If you want to view the times in another time zone, fill in this field

Use these fields to narrow your search

```
M3000US                        Work with Messages

   Account ID.............   ACCT1
   User ID................   USER1
   Time zone..............   EST
   Partner or alias.......   _____ or _____
   Begin date - time.......  __ / __ / __ - __ : __    Date format - MM/DD/YY
   End date - time.........  __ / __ / __ - __ : __    Date format - MM/DD/YY
   User message class......  _____

   Action.................   4   1. List inbound messages
                                 2. List outbound messages
                                 3. Send a message
                                 4. List archived message groups
```

Choose Action 4

```
M3410US              List Archived Message Groups

   Account ID.............   ACCT1
   User ID................   USER1

   Codes (multiple selection):
    D = Delete message group              R = Retrieve message group
    S = See message group
          Archive    First msg archived    Last msg archived    Messages
   Code   reference    Date     Time         Date     Time      in group
          ARCHIVE1   02/09/99  10:13:53    02/09/99  10:21:31  0000000010
    _     ARCHIVE2   02/15/99  11:21:21    02/15/99  11:22:23  0000000042
    _     ARCHIVE3   02/20/99  10:12:19    02/20/99  12:12:52  0000000158
    _
```

NOTE: The First msg archived column and the Last msg archived column tell you when the first message of the group was archived and when the last message of the group was archived.

Looking at information about an archived message

Information Exchange Administration Services gives you two types of information about an archived message:

■   The common data header (CDH)

The common data header (CDH) provides details (such as the file name and carriage-return and line-feed options) that enable the receiving application to reconstruct a received message to its original format. System error messages do not have a CDH.

Messages sent with Information Exchange Administration Services or an Expedite Licensed Program have a CDH.

The CDH for archived messages and inbound and outbound messages is the same. For more information on the fields in the CDH, see "Looking at the information in the common data header" on page 205.

■   Other information, such as the sender and receiver

The additional information for archived messages and inbound and outbound messages is similar with the exception of the following field:

■   **Delete date**
This is the date the message is scheduled for deletion from the archive.

For more information on the additional information fields, see "Looking at the information in a message" on page 202.

NOTE: There is no charge for looking at the information about a message.

To look at information about an archived message, follow this path.

```
M3000US                        Work with Messages

   Account ID..............   ACCT1
   User ID.................   USER1
   Time zone...............   EST
   Partner or alias........   _____ or _____
   Begin date - time.......   __/__/__ - __:__   Date format - MM/DD/YY
   End date - time.........   __/__/__ - __:__   Date format - MM/DD/YY
   User message class......   _____

   Action.................   4   1. List inbound messages
                                 2. List outbound messages
                                 3. Send a message
                                 4. List archived message groups
```

If you want to view the times in another time zone, fill in this field

Use these fields to narrow your search

Choose Action 4

```
M3410US              List Archived Message Groups

   Account ID..............   ACCT1
   User ID.................   USER1

   Codes (multiple selection):
     D = Delete message group            R = Retrieve message group
     S = See message group
          Archive    First msg archived    Last msg archived      Messages
   Code   reference    Date      Time        Date      Time       in group
    S     ARCHIVE1   02/15/99  10:12:24    02/20/99  10:21:31    0000000010
          ARCHIVE2   02/15/99  11:21:21    02/16/99  11:22:23    0000000042
    S     ARCHIVE3   02/20/99  10:12:19    02/20/99  12:23:52    0000000158
```

Fill in S next to each group you want to work with

You can select more than one group at a time. When you are ready, press Enter.

You see a panel like this one.

```
M3411US                    List Archived Messages

Account ID..............  ACCT1
User ID.................  USER1
Archive reference ID....  ARCHIVE1

Codes (multiple selection):              D = Delete message
  H = View the common data header        R = Retrieve message
  S = See additional information         V = View message text (BILLABLE)
                             ----- Sent ------  User msg  EDI ctrl ID or  CDH
Code  ----- Sender ID ------  Date      Time     class    Message name    ind
 H   X1   IDX0001           02/15/99 10:12:24 CLASS1   CTRLID00001      Y
 S   SY3  ACCT1    USER4    02/16/99 10:13:35 CLASS2   MESSAGE2
     ACCT1    USER5    02/17/99 10:14:14 CLASS3   MESSAGE3
 H   SY4  ACCT1    USER2    02/18/99 11:20:32 CLASS4   MESSAGE4         Y
 _   X3   IDX0003           02/18/99 11:21:18 CLASS5   CTRLID00005
 _   X4   IDX0004           02/19/99 11:22:32 CLASS6   CTRLID00004
 S        ACCT1    USER6    02/19/99 11:23:18 CLASS7   MESSAGE5         Y
 _        ACCT1    USER7    02/19/99 11:25:30 CLASS8   MESSAGE6


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward  F12=Cancel
```

Fill in H next to each message for which you want to view the CDH

Fill in S next to each message for which you want additional information

To look at the CDH, type **h** next to the message.

To look at additional information, type **s** next to the message.

Looking at the common data header

The CDH has two panels of information. Here is an example.

```
M3414US         Common Data Header for an Archived Message   (Panel 1 of 2)

 Account ID..............  ACCT1
 User ID.................  USER1

 Action.................  _  D = Delete message
                             R = Retrieve message
                             S = See additional information
                             V = View message text (BILLABLE)

 File ID.....  FILEID
 File loc....  FILELOCATION
 Description.  DESCRIPTION FOR FILE

 Record format. F        Record length... 00079   Record delimiter.... NONE
 Data type..... EBCDIC   Data format..... NOT EDI Translate type...... IE
 Sending system 90       Sending version. 4       Sending code page...
 File date..... 02/15/99 File time....... 10:12:24 Unique ID........... 00309455


 Command ===>
 Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward  F12=Cancel
```

The first panel shows some of the CDH details

```
M3415US         Common Data Header for an Archived Message    (Panel 2 of 2)


  Account ID..............  ACCT1
  User ID.................  USER1

  Action.................  _  D = Delete message
                              R = Retrieve message
                              S = See additional information
                              V = View message text (BILLABLE)

 CR, LF, EOF Characters...........
 EDI sender ID qual / sender ID....       /
 EDI receiver ID qual / receiver ID       /
 EDI interchange control ID........
 Library owning account...........  ACCT1
 Library name / member name........  LIB1     / MEMBER1
 Software used for compression.....
 Version of software used.........
 Compressed file name


  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward  F12=Cancel
```

The second panel shows the rest of the CDH information

If the data is EDI data and the sending interface is an Expedite Licensed interface program, the following fields are displayed:

■ The EDI sender ID qualifier and sender ID
■ The EDI receiver ID qualifier and receiver ID
■ The EDI interchange control ID

If the message was retrieved from a library, these fields are filled in:

■ The ID of the account that owns the library this message came from.

■ The library that contains this message and the name of the member this message came from.

For more information on the fields in the CDH, see "Looking at the information in a message" on page 202.

Looking at additional information

Here is an example of some additional information.

```
M3412US             Information about an Archived Message

   Account ID... ACCT1
   User ID...... USER1
   Action.......  _  D = Delete message
                     H = View the common data header
                     R = Retrieve message
                     V = View message text (BILLABLE)
   Sender................................ SY3 ACCT1    USER4
   User message class.................... CLASS2
   Date and time sent.................... 02/19/99 - 11:23:18
   Message name.......................... MESSAGE2
   Message sequence...................... 000001
   Delete date........................... 02/22/99
   With CDH: Number of msgs / total size... 0000000002 / 0000000376
   Without CDH: Number of msgs / total size 0000000001 / 0000000325
   Priority..............................
   Carbon copy type...................... RECEIVE
   Partner's ID..........................    ACCT1    USER4


   Command ===>
   Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

These fields give you additional information about the message

These fields display for messages that result from a carbon copy or a redirect:

■ **Carbon copy type**
■ **Partner's ID**
  For carbon copy messages, this field displays only if the recipient is specified to pay at least one of the carbon copy charges.

For more information about the fields on this panel, see "Looking at the information in a message" on page 202.

Retrieving archived messages

You can retrieve either an archived message group or a specific message stored inside an archived message group. Messages retrieved from archive are not candidates for carbon copy processing.

NOTE: Archived messages are always retrieved into the owner's mailbox. When you want to retrieve a message or messages you previously stored in an archive, you must know the archive group the message was stored in. The name of the archive group is identified by the "Archive reference," which was assigned when the message or messages were received.

There is a receive-side charge when the message or messages are received after being retrieved to the mailbox.

Retrieving a message group

To retrieve an archived message group, follow this path.

If you want to view the times in another time zone, fill in this field

Use these fields to narrow your search

Choose Action 4

```
M3000US                      Work with Messages

  Account ID..............  ACCT1
  User ID.................  USER1
  Time zone...............  EST
  Partner or alias........  _____ or _____
  Begin date - time.......  __ / __ / __ - __ : __   Date format - YY/MM/DD
  End date - time.........  __ / __ / __ - __ : __   Date format - YY/MM/DD
  User message class......  _____

  Action.................  4   1. List inbound messages
                               2. List outbound messages
                               3. Send a message
                               4. List archived message groups
```

You see a panel like this one.

Fill in R next to each group you want to retrieve

```
M3410US               List Archived Message Groups

  Account ID.............  ACCT1
  User ID................  USER1

  Codes (multiple selection):
    D = Delete message group              R = Retrieve message group
    S = See message group
          Archive    First msg archived    Last msg archived     Messages
  Code   reference    Date      Time        Date      Time        in group
    R    ARCHIVE1    02/15/99  11:13:53    02/15/99  12:13:31    0000000010
    _    ARCHIVE2    02/15/99  11:15:21    02/16/99  11:50:23    0000000042
    R    ARCHIVE3    02/20/99  12:23:19    02/22/99  10:12:52    0000000158
```

You can retrieve more than one group at a time. When you are ready, press F3.

The messages are retrieved into the owner's mailbox. You work with them the same way you work with inbound messages.

Retrieving a specific message

To retrieve a specific message from an archived message group, follow this path.

If you want to view the times in another time zone, fill in this field

Use these fields to narrow your search

Choose Action 4

```
M3000US                      Work with Messages

  Account ID..............  ACCT1
  User ID.................  USER1
  Time zone...............  EST
  Partner or alias........  _____ or _____
  Begin date - time.......  __ / __ / __ - __ : __    Date format - MM/DD/YY
  End date - time.........  __ / __ / __ - __ : __    Date format - MM/DD/YY
  User message class......  _____

  Action..................  4   1. List inbound messages
                                2. List outbound messages
                                3. Send a message
                                4. List archived message groups
```

Fill in S next to each group you want to retrieve a message from

```
M3410US               List Archived Message Groups

  Account ID.............  ACCT1
  User ID................  USER1

  Codes (multiple selection):
   D = Delete message group               R = Retrieve message group
   S = See message group
       Archive    First msg archived   Last msg archived     Messages
  Code reference   Date      Time        Date      Time       in group
   S   ARCHIVE1  02/15/99  10:12:24   02/15/99  12:13:31    0000000010
       ARCHIVE2  02/15/99  11:15:21   02/16/99  11:50:23    0000000042
   S   ARCHIVE3  02/20/99  12:23:19   02/22/99  10:12:52    0000000158
```

You can select more than one group at a time. When you are ready, press Enter.

You see a panel like this one.

Fill in R next to each message you want to retrieve

```
M3411US                   List Archived Messages

  Account ID..............  ACCT1
  User ID.................  USER1
  Archive reference ID....  ARCHIVE1

  Codes (multiple selection):            D = Delete message
   H = View the common data header        R = Retrieve message
   S = See additional information         V = View message text (BILLABLE)
                               ----- Sent ------  User msg  EDI ctrl ID or  CDH
  Code ----- Sender ID ------  Date     Time      class     Message name    ind
   R   X1   IDX0001            02/15/99 10:12:24 CLASS1    CTRLID00001      Y
       SY3  ACCT1    USER4     02/15/99 10:13:35 CLASS2    MESSAGE2
   R        ACCT1    USER5     02/15/99 10:14:14 CLASS3    MESSAGE3
   _   SY4  ACCT1    USER2     02/15/99 11:22:32 CLASS4    MESSAGE4         Y
   _   X3   IDX0003            02/15/99 11:23:18 CLASS5    CTRLID00005
   _   X4   IDX0004            02/15/99 11:21:32 CLASS6    CTRLID00004
   _        ACCT1    USER6     02/15/99 11:22:18 CLASS7    MESSAGE5
   _        ACCT1    USER7     02/15/99 11:24:30 CLASS8    MESSAGE6         Y


Command ===>
 Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward  F12=Cancel
```

You can select to retrieve more than one message at time. When you are ready, press F3. The messages are retrieved into the owner's mailbox. You work with them the same way you work with inbound messages.

Retrieving archived messages owned by a cluster mailbox

You can retrieve archived message groups and archived messages owned by a parent user ID. You must retrieve the messages into a child user ID mailbox.

Retrieving an archived message group into a cluster mailbox

To retrieve an archived message group owned by a cluster user ID, follow this path.

Fill in the parent user ID here

You **cannot** use a child user ID when you choose Action 4 on this panel

Choose Action 4

```
M3000US                     Work with Messages

  Account ID.............  ACCT1
  User ID................  USER1
  Time zone..............  EST
  Partner or alias.......  _____  or  _____
  Begin date - time......  __ / __ / __ - __ : __   Date format - MM/DD/YY
  End date - time........  __ / __ / __ - __ : __   Date format - MM/DD/YY
  User message class.....  _____

  Action................  4   1. List inbound messages
                              2. List outbound messages
                              3. Send a message
                              4. List archived message groups
```

Fill in R next to each group you want to retrieve

```
M3410US               List Archived Message Groups

  Account ID.............  ACCT1
  User ID................  USER1

  Codes (multiple selection):
    D = Delete message group              R = Retrieve message group
    S = See message group
         Archive    First msg archived    Last msg archived     Messages
  Code   reference    Date       Time        Date      Time      in group
    R    ARCHIVE1   02/10/99   10:13:53    02/10/99  11:13:31   0000000010
         ARCHIVE2   02/15/99   11:15:21    02/16/99  11:50:23   0000000042
    R    ARCHIVE3   02/20/99   12:23:19    02/22/99  10:12:52   0000000158
```

You can select to retrieve more than one group at a time. When you are ready, press F3.

You see a panel like this one.

Fill in the child user ID mailbox that you want to receive the archived message group, and press F3

```
M3418US              Retrieve Archived Message Group

  Account ID.............  ACCT1
  User ID................  USER1
  Archive Reference ID....  ARCHIVE1

  A cluster parent ID owns the archive message group.
  Enter the specific cluster child ID that you wish the
  retrieved archived message group to be sent to:

  Cluster Child User ID... USER101
```

The Retrieve Archived Message Group panel displays for each group of archived messages you requested to retrieve.

You can select to retrieve more than one message at a time. When you are ready, press F3. The messages are retrieved into the owner's mailbox. You work with them the same way you work with inbound messages.

Retrieving a specific archived message into a cluster mailbox

To retrieve a specific archived message owned by a cluster user ID, follow this path.

Fill in the parent user
ID here

You **cannot** use a
child user ID when you
choose Action 4 on this
panel

Choose Action 4

```
M3000US                        Work with Messages

  Account ID.............  ACCT1
  User ID................  USER1
  Time zone..............  EST
  Partner or alias.......  __/__/__ - __:__  or  _____
  Begin date - time.......  __ / __ / __ - __ : __   Date format - MM/DD/YY
  End date - time........  __ / __ / __ - __ : __   Date format - MM/DD/YY
  User message class......  _____

  Action.................  4   1. List inbound messages
                               2. List outbound messages
                               3. Send a message
                               4. List archived message groups
```

Fill in S next to each
message group that you
want to retrieve a message
from

```
M3410US              List Archived Message Groups

  Account ID.............  ACCT1
  User ID................  USER1

  Codes (multiple selection):
    D = Delete message group            R = Retrieve message group
    S = See message group
         Archive    First msg archived    Last msg archived     Messages
  Code   reference   Date     Time        Date     Time        in group
    S     ARCHIVE1  02/15/99  10:13:53    02/15/99  12:53:31   0000000010
    _     ARCHIVE2  02/15/99  11:45:21    02/16/99  12:50:23   0000000042
    S     ARCHIVE3  02/20/99  12:23:19    02/22/99  10:12:52   0000000158
```

You can select more than one group at a time. When you are ready, press Enter.

You see a panel like this one.

Fill in R next to
each message you want
to retrieve and press F3

```
M3411US              List Archived Messages

  Account ID.............  ACCT1
  User ID................  USER1
  Archive reference ID....  ARCHIVE1

  Codes (multiple selection):          D = Delete message
    H = View the common data header    R = Retrieve message
    S = See additional information     V = View message text (BILLABLE)
                            ----- Sent ------ User msg  EDI ctrl ID or  CDH
  Code  ----- Sender ID ------  Date     Time   class   Message name    ind
    R   X1   IDX0001            02/15/99 10:13:53 CLASS1  CTRLID00001     Y
    _   SY3  ACCT1     USER4    02/15/99 10:14:00 CLASS2  MESSAGE2
    R   _   ACCT1     USER5    02/15/99 10:14:14 CLASS3  MESSAGE3
    _   SY4  ACCT1     USER2    02/15/99 11:22:32 CLASS4  MESSAGE4        Y
    _   X3   IDX0003            02/15/99 11:23:18 CLASS5  CTRLID00005
    _   X4   IDX0004            02/15/99 11:21:32 CLASS6  CTRLID00004
    _        ACCT1     USER6    02/15/99 11:22:18 CLASS7  MESSAGE5
    _        ACCT1     USER7    02/15/99 11:24:30 CLASS8  MESSAGE6        Y


  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward  F12=Cancel
```

You can select more than one message at a time. When you are ready, press F3.

You see a panel like this one.

Fill in the child user ID
mailbox that you want
to receive the archived
message(s), and press
F3

```
M3419US                    Retrieve Archived Message(s)

    Account ID.............  ACCT1
    User ID................  USER1
    Archive Reference ID....  ARCHIVE1

    A cluster parent ID owns the archive message(s).
    Enter the specific cluster child ID that you wish the
    retrieved archived message(s) to be sent to:

    Cluster Child User ID... USER101
```

The Retrieve Archived Message(s) panel displays once, regardless of the number of messages
you selected for retrieval.

You can select to retrieve more than one message at time. When you are ready, press F3. The
messages are retrieved into the owner's mailbox. You work with them the same way you work
with inbound messages.

Looking at the text of an archived message

To look at the text of an archived message, follow this path.

If you want to view the
time in another time
zone, fill in this field

Use these fields to
narrow your search

Choose Action 4

```
M3000US                          Work with Messages

  Account ID..............  ACCT1
  User ID.................  USER1
  Time zone...............  EST
  Partner or alias........  _____  or  _____
  Begin date - time.......  __ / __ / __  -  __ : __     Date format - MM/DD/YY
  End date - time.........  __ / __ / __  -  __ : __     Date format - MM/DD/YY
  User message class......  _____

  Action..................  4   1. List inbound messages
                                2. List outbound messages
                                3. Send a message
                                4. List archived message groups
```

Fill in S next to each
group you want to work
with

```
M3410US                      List Archived Message Groups

  Account ID..............  ACCT1
  User ID.................  USER1

  Codes (multiple selection):
    D = Delete message group                  R = Retrieve message group
    S = See message group
           Archive     First msg archived     Last msg archived      Messages
  Code     reference    Date       Time         Date       Time       in group
    S      ARCHIVE1    02/15/99  10:12:24     02/15/99  12:13:31     0000000010
    _      ARCHIVE2    02/15/99  11:15:21     02/16/99  11:50:23     0000000042
    S      ARCHIVE3    02/20/99  12:23:19     02/22/99  10:12:52     0000000158
```

You can select more than one group at a time. When you are ready, press Enter.

You see a panel like this one.

Fill in V next to each
message for which you
want to view the text

```
M3411US                      List Archived Messages

  Account ID..............  ACCT1
  User ID.................  USER1
  Archive reference ID....  ARCHIVE1

  Codes (multiple selection):          D = Delete message
    H = View the common data header    R = Retrieve message
    S = See additional information     V = View message text (BILLABLE)
                              ----- Sent ------  User msg  EDI ctrl ID or  CDH
  Code   ----- Sender ID ------  Date     Time     class    Message name   ind
    V    X1   IDX0001          02/15/99 10:12:24 CLASS1    CTRLID00001     Y
    _    SY3  ACCT1   USER4    02/15/99 10:13:35 CLASS2    MESSAGE2
    V    _    ACCT1   USER5    02/15/99 10:14:14 CLASS3    MESSAGE3
    _    SY4  ACCT1   USER2    02/15/99 11:22:32 CLASS4    MESSAGE4        Y
    _    X3   IDX0003          02/15/99 11:23:18 CLASS5    CTRLID00005
    _    X4   IDX0004          02/15/99 11:21:32 CLASS6    CTRLID00004
    _         ACCT1   USER6    02/15/99 11:24:18 CLASS7    MESSAGE5        Y
    _         ACCT1   USER7    02/15/99 11:24:30 CLASS8    MESSAGE6        Y


  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward  F12=Cancel
```

Depending on the message, you may have to select the text format to look at the message text. If the message meets the following conditions, Information Exchange Administration Services displays the Format Selection for Viewing panel before you see the message text:

- The message has a CDH.
- The record format in the CDH is a fixed length.
- The record length in the CDH is not equal to 79 or zero.
- The data format in the CDH is "NOT EDI".

Here is an example of the Format Selection for Viewing panel.

```
M9999US                    Format Selection for Viewing

  Account ID..............  ACCT1
  User ID................  USER1

  The data you are viewing has a record length of 02345 and the panel
  displays 79 characters per line.

  If the data is viewed as is, wrapping will occur.
  Action.................  _  W = view in Wrapped format
                              O = view One record per line



  Warning - The record length is greater than 2340.
  Only the first 2340 characters will be displayed.
```

Fill in W or O to specify how you want to see the text

For more information on selecting the format for viewing, see "Handling the format selection for viewing" on page 28.

Here is an example of the View Archived Message Text panel.

```
M3413US           View Archived Message Text       Page    000001 of 000005
                                                   Columns   00001 - 00079
  Message text sent to
    Account ID / User ID.... ACCT1    / USER8      This is a BILLABLE function

  The new project manual is now available for comment.  Please direct comments
  to ACCT1/USER4.

  The alternate reviewers are as follows:
      _  ACCT2/USER5
      _  ACCT2/USER6
      _  ACCT2/USER7
```

You can fill in a page number here to move directly to that page

You are charged the first time you view each panel in the message

NOTE: If you leave this message and then choose to view the text again, you are charged again the first time you view each panel.

There is no charge for viewing messages from ID *SYSTEM* *ERRMSG*, *SYSTEM* *ADMIN**, *SYSTEM* **X.400**, or *SYSTEM**SMTPGW**.

See the *Information Exchange Charges Reference* for more information.

Deleting archived message groups and archived messages

The maximum number of days an archived message is kept is determined by the "Number of audit/session/event days:" field in the user profile. However, you can delete archived messages prior to their expiration by choosing to either delete an archived message group or an archived message. Information Exchange Administration Services displays a confirmation for each delete request.

NOTE: You are only charged for the number of days the message remains in archive.

Deleting an archived message group

To delete an archived message group, follow this path:

If you want to view the times in another time zone, fill in this field

Use these fields to narrow your search

Choose Action 4

```
M3000US                    Work with Messages

  Account ID.............  ACCT1
  User ID................  USER1
  Time zone..............  EST
  Partner or alias........  ___ / ___ / ___ ___ ___ ___  or  ____
  Begin date - time.......  __ / __ / __ - __ : __   Date format - YY/MM/DD
  End date - time.........  __ / __ / __ - __ : __   Date format - YY/MM/DD
  User message class......  _____

  Action.................  4   1. List inbound messages
                               2. List outbound messages
                               3. Send a message
                               4. List archived message groups
```

Fill in D next to each group you want to delete

```
M3410US               List Archived Message Groups

  Account ID.............  ACCT1
  User ID................  USER1

  Codes (multiple selection):
    D = Delete message group            R = Retrieve message group
    S = See message group
          Archive    First msg archived      Last msg archived      Messages
  Code    reference   Date      Time          Date      Time        in group
  D       ARCHIVE1   02/15/99  11:13:53      02/15/99  12:13:31     0000000010
          ARCHIVE2   02/15/99  11:15:21      02/16/99  11:50:23     0000000042
  D       ARCHIVE3   02/20/99  12:23:19      02/22/99  10:12:52     0000000158
```

You can select to delete more than one group. When you are ready, press F3.

You see a panel like this one displaying the following information:

■   The account ID and user ID of the archive owner.

■   The archive reference ID of the message group you want to delete.

■   The number of messages contained in the archive group selected.

Fill in Y if you want to delete the message group, or fill in N if you do not want to delete the message group

```
M3416US            Delete an Archived Message Group

  Account ID.............  ACCT1
  User ID................  USER1
  Archived Reference ID...  ARCHIVE1

   WARNING - This archive message group contains 0000000010 messages.
             They will all be deleted.

  Do you want to delete this archive group? (Y/N)  y
```

NOTE: Information Exchange displays this panel for each archived message group you select to delete.

For more information, see "Confirming deletions" on page 27.

Deleting a specific archived message

To delete one or more archived messages, follow this path:

If you want to view the times in another time zone, fill in this field

Use these fields to narrow your search

Choose Action 4

```
M3000US                       Work with Messages

  Account ID.............  ACCT1
  User ID................  USER1
  Time zone..............  EST
  Partner or alias.......  _____  or  ____
  Begin date - time......  __ / __ / __ - __ : __    Date format - MM/DD/YY
  End date - time........  __ / __ / __ - __ : __    Date format - MM/DD/YY
  User message class.....  _____

  Action.................  4   1. List inbound messages
                               2. List outbound messages
                               3. Send a message
                               4. List archived message groups
```

Fill in S next to each group you want to work with

```
M3410US              List Archived Message Groups

  Account ID.............  ACCT1
  User ID................  USER1

  Codes (multiple selection):
    D = Delete message group              R = Retrieve message group
    S = See message group
         Archive    First msg archived    Last msg archived     Messages
  Code   reference   Date      Time         Date      Time      in group
   S     ARCHIVE1   02/15/99  10:12:24    02/15/99  12:13:31   0000000010
         ARCHIVE2   02/15/99  11:15:21    02/16/99  11:50:23   0000000042
   S     ARCHIVE3   02/20/99  12:23:19    02/22/99  10:12:52   0000000158




  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

You can select more than one group at a time. When you are ready, press Enter.

You see a panel like this one.

Fill in D next to the message you want to delete and press F3

```
M3411US                 List Archived Messages

Account ID.............  ACCT1
User ID................  USER1
Archive reference ID....  ARCHIVE1

Codes (multiple selection):            D = Delete message
  H = View the common data header      R = Retrieve message
  S = See additional information       V = View message text (BILLABLE)
                          ----- Sent ------   User msg  EDI ctrl ID or   CDH
Code  ----- Sender ID ------  Date    Time     class    Message name     ind
 D   X1   IDX0001          02/15/99 10:12:24  CLASS1   CTRLID00001       Y
     SY3  ACCT1   USER4    02/15/99 10:13:35  CLASS2   MESSAGE2
 D        ACCT1   USER5    02/15/99 10:14:14  CLASS3   MESSAGE3
     SY4  ACCT1   USER2    02/15/99 11:22:32  CLASS4   MESSAGE4          Y
     X3   IDX0003          02/15/99 11:23:18  CLASS5   CTRLID00005
     X4   IDX0004          02/15/99 11:21:32  CLASS6   CTRLID00004
          ACCT1   USER6    02/15/99 11:24:18  CLASS7   MESSAGE5          Y
          ACCT1   USER7    02/15/99 11:24:30  CLASS8   MESSAGE6          Y

  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward  F8=Forward  F12=Cancel
```

You can select to delete more than one message at a time. When you are ready, press F3.

You see a panel displaying the following information:

- The account ID and user ID of the archive owner.
- The archive reference ID of the message(s) you want to delete.
- The number of messages requested to be deleted for this group.

> NOTE: This panel displays only once for all selected messages. You cannot confirm each delete request individually.

Fill in Y if you want to delete the message(s), or fill in N if you do not want to delete the message(s)

```
M3417US                    Delete an Archived Message

   Account ID.............  ACCT1
   User ID...............  USER1
   Archived Reference ID...  ARCHIVE1

   You have selected to delete 0000000002 archived messages from the
   archive group.

   Do you want to delete these archive messages? (Y/N)  y




   Command ===>
   Enter F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

For more information, see "Confirming deletions" on page 27.

Working with audit trails, session traces, and receive traces

The information you find in audit trails, session traces, and receive traces can be used to monitor users' activity in Information Exchange.

Audit trails provide information about regular messages sent by a user or sent to a user, and information about messages that result from carbon copy requests.

Session traces provide information about users' sessions with Information Exchange.

Receive traces provide information about receive commands issued during a user's session with Information Exchange.

This chapter covers the following:

Understanding audit trails

Audit records are created for regular messages sent by a local user or sent to a local user. Audit records are also created for carbon copy messages requested by a local user or sent to a local user.

For regular messages, the following audits are created:

■ A Received and Receivable Message audit for the original intended receiver

■ A Sent Message audit for the message sender

For carbon copy messages, the following audits are created:

■ A Received and Receivable Message audit for the carbon copy recipient

■ A Sent Message audit for the carbon copy requester

■ A Carbon Copy as Partner audit for the carbon copy partner

> NOTE: The Carbon Copy as Partner audit is only created if the partner in the carbon copy relationship is designated to pay either of the carbon copy charges.

You can look at audit trail information to find out the status of messages. Each time you look at audit record panels, you incur Information Exchange charges. See the *Information Exchange Charges Reference* for more information.

You can retrieve audit trails into your mailbox so that you can retain them for your records. When you request audit records to be sent to your mailbox, you generate an Information Exchange message that contains those audit records. When you receive that message from your mailbox, you incur Information Exchange charges.

Understanding the status and flow of messages in the audit trail

When you use Information Exchange to send and receive regular messages, you can see the status of the message by looking at the Audit Trail for Sent Messages or the Audit Trail for Received and Receivable Messages.

When carbon copy messages are generated or received, you see the status of the message by looking at the following: the Audit Trail for Sent Messages, the Audit Trail for Received and Receivable Messages, or the Audit Trail for Carbon Copies as Partner.

Messages can be exchanged with trading partners who are on any of the following:

■ The same Information Exchange system

■ Another Information Exchange system

■ A non-Information Exchange system

■ An X.400 system

■ An SMTP mail system

■ Another value added network (VAN)

The status displayed in the "S" field on the "Audit Trail for Sent Messages," the "Audit Trail for Received and Receivable Messages," and the "Audit Trail for Carbon Copies as Partner" panels shows the disposition of the message as follows:

If the code is:	This means:
T	**In transit** The message is being transferred to another system. The transfer is not complete.
R	**Received** The message is received by the trading partner. **Sent to non-IE** The message is transferred to a non-Information Exchange system**.**
P	**Purged** The message is purged and the reason is displayed.
M	**Mailboxed** The message is in the trading partner's mailbox.
Q	**Queued** The message is queued to another value added network (VAN). The transfer is not complete.
X	**Transferred** The message is transferred to another system. The other system has accepted the message but does not support message disposition updates. The final disposition (Received/Purged) of the message is unknown; for example, the message has gone to another VAN that does not support Interchange Delivery Notice (TA3), or to an SMTP mail system.
F	**Forwarded** The message is forwarded to another system. The other system has accepted the message and will inform Information Exchange when: • The message is placed in the trading partner's mailbox • The message is received • The message is purged
E	**Redirected** The message is redirected to another mailbox as a result of carbon copy processing. This is the final status for this message.

The following table shows the status changes for messages sent to a trading partner.

Messages sent to:	Can have these status changes:
The local Information Exchange system	Mailboxed (M) ® Received (R) ® or Purged (P) or Redirected (E)
Another Information Exchange system, including the Information Exchange Peer System and the EDI Server	In Transit (T) ® Mailboxed (M) ® Received (R) or Purged (P)
A non-Information Exchange system (such as Mail Exchange)	In Transit (T) ® Sent to non-Information Exchange (R)
A VAN that supports TA3 and messages to users of MQSeries Services	In Transit (T) ® Queued (Q) ® Forwarded (F) ® Mailboxed (M) ® Received (R) or Purged (P)
A VAN that does not support TA3	In Transit (T) ® Queued (Q) ® Forwarded (F) ® Transferred (X)
An SMTP mail system	In Transit (T) ® Forwarded (F) ® Transferred (X)

The following table shows the status changes for P2 messages sent to a trading partner on an X.400 system.

Messages sent to:	Can have these status changes:
An X.400 system that supports Delivery Reports (DR) and Non-Delivery Reports (NDR)	In Transit (T) ® Forwarded (F) ® Received (R) or Purged (P)
An X.400 system that does not support DR or NDR	In Transit (T) ® Forwarded (F) ® Transferred (X)

The following table shows the status changes for P35 messages sent to a trading partner on an X.400 system.

Messages sent to:	Can have these status changes:
An X.400 system that supports DR, NDR, and EDI Notification (EDIN)	In Transit (T) ® Forwarded (F) ® Mailboxed (M) ® Received (R) or Purged (P)
An X.400 system that does not support DR or NDR, but does support EDIN	In Transit (T) ® Forwarded (F) ® Received (R) or Purged (P)
An X.400 system that supports DR and NDR, but does not support EDIN	In Transit (T) ® Forwarded (F) ® Mailboxed (M) ® Transferred (X)
An X.400 system that does not support DR, NDR, or EDIN	In Transit (T) ® Forwarded (F) ® Transferred (X)

Looking at audit trail information

Here is the information included in the audit trail. Unless specified, these fields apply to regular messages and carbon copy messages.

- **Cluster Child ID**
  This displays only when dealing with cluster user IDs. It identifies which child user ID received or sent the message.

- **Sender's ID or Receiver's ID**
  The sender or receiver may be:
  - An account ID and user ID (plus a system ID, if the user is on another system)
  - An alias reference

- **Sender's system type and level**
  This field identifies the system type and system level used by the sender.

- **Date and time purged or delivered**
  This is the date and time the message was delivered or purged from the mailbox. Messages are considered delivered if they are:

  - Received
  - Sent to a non-Information Exchange system
  - Transferred
  - Redirected

- **Message key**
  This is a unique key assigned by Information Exchange to identify a message or a group of messages.

- **Mailbag number**
  This number identifies messages sent to another value added network.

■ **Redirected to mailbox ID (regular message only)**
This field is only displayed if the account ID and user ID at the top of the panel is the requester of the carbon copy that caused the message to be redirected.

■ **Carbon copy partner's ID (carbon copy only)**
• For a send carbon copy, this is the ID of the intended receiver of the original message.
• For a receive or redirect, this is the ID of the sender of the original message.

■ **Carbon copy recipient (carbon copy only)**
This is the user ID that received the carbon copy message.

■ **Archive or session ID**
The field is blank until the message is received. If the message was archived when it was received, you see the archive identifier. If the message was not archived when it was received, you see the session identifier.

■ **EDI control ID**
This contains the interchange control number for EDI data.

■ **User message name**
This is the message name specified by the message sender. This field is blank unless a name is specified when the message is sent.

■ **Message sequence in**
This identifies a message or group of messages. This field is blank unless a sequence is specified when the message is sent.

■ **User message class**
This is the user message class specified by the message sender. This field is blank unless a user message class was specified when the message was sent.

■ **Network msg class**
This determines certain special process classifications for a message.

This value:	Means:
Blank	A regular message with no CDH
R	A test-mode message with CDH available
S	A regular message with CDH available
T	A test-mode message with no CDH

■ **IE output sequence**
The output sequence is assigned by Information Exchange when the message is received.

■ **CC type (carbon copy only)**
This indicates the type of carbon copy requested. The possible values are:

This value:	For:
SEND CC	A carbon copy requested by the sender
RECV CC	A carbon copy requested by the receiver
SEND RED	A carbon copy with "Purge original message?" set to **y,** requested by the sender
RECV RED	A carbon copy with "Purge original message?" set to **y,** requested by the receiver
REDIRECT	Carbon copy with "Purge original message?" set to **y,** requested by an intersystem partner (a user on an Information Exchange system other than your local Information Exchange system)

■ **data type (carbon copy only)**
This indicates the data type of the carbon copy message. The possible values are:

• X12
• EDIFACT
• UCS
• UN/TDI
• NOT EDI

■ **Who pays? (regular message only)**
This identifies who pays the send-side and receive-side charges associated with a regular message. The values are:

• SENDER PAYS ALL
• RECEIVER PAYS ALL
• SPLIT

■ **Number of msgs in group**
This is the number of messages in a message group. This does not include the common data header (CDH).

■ **Total size**
This is the size of the message or the message group sent. The size does not include the CDH.

■ **Status of the message (S)**
The following is a list of the various message status codes and what each code represents:

The status is:	If the "S" column displays:
RCVR REDIRECT, SENDER REDIRECT, REDIRECTED	E
Forwarded	F
In **M**ailbox	M
Purged	P
Queued	Q
Received	R
In Transit	T
Transferred	X

■ **Message ID**
This field displays an identifier for the message and is assigned as follows:

• For non-EDI data
  - The message name value assigned by the sender.

  - The message sequence value assigned by the sender.

• For EDI data
  - The EDI exchange control number value from the EDI envelope.

■ **Purge reason, if the message was purged**

The following is a list of purge codes:

EXPIRE UNDELVRD	The message was still in the receiver's mailbox when the retention period expired. Information Exchange deleted the message from the receiver's mailbox.
CANCEL BY SNDR	The sender deleted the message from the receiver's mailbox before the message was received.
CANCEL BY RCVR	The receiver deleted the message from the receiver's mailbox before the message was received.
CANCEL SVC ADMN	A service administrator deleted the message from the receiver's mailbox before it was received.
CANCEL BY NETWK	A network representative deleted the message from the receiver's mailbox before it was received.
UNDELIVERABLE	The message was sent to an account ID and user ID that did not have an Information Exchange profile, or payments could not be resolved.
UNDELIVER IMMED	The message was sent with a priority of immediate delivery and the receiver was not in the process of receiving messages.
PROCESSED S/ADM	The message sent to the *SYSTEM* *ADMIN** mailbox was purged after being processed by Information Exchange.
RCVR ID DELETED	Information Exchange purged the message because the user ID was deleted.

■ **Who pays CC processing? (carbon copy only)**
This is the user charged for the processing of the carbon copy.

■ **Who pays CC receive? (carbon copy only)**
This is the user charged for receiving the carbon copy.

■ **Send and Receive dates and times**

All dates and times are set by the Information Exchange system unless otherwise specified.

If the message is for an Information Exchange user:
• The send date and time when:

- The sender started sending the message.

- The sender stopped sending the message.

- The message was committed to Information Exchange (this relates to recovery level).

- The message was queued, forwarded, or available to be received.

• The receive date and time when:

- The receiver started receiving the message.

- The receiver stopped receiving the message.

- The message was committed by Information Exchange (this relates to recovery level).

- The message was purged from the mailbox, transferred, sent to a non-Information Exchange system, redirected, or received.

If the message is from an X.400 user to an Information Exchange user:
• The send date and time when:

- The sender started sending the message.

That is, when the sender's X.400 system accepted the message from the sender (a user agent). This value is set using information from the incoming X.400 message.

- The sender stopped sending the message.

That is, when the Information Exchange X.400 system accepted the message from the sender's X.400 system. This value is set using information from the Information Exchange X.400 system.

- The message was committed to Information Exchange.

That is, when Information Exchange accepted the message from the Information Exchange X.400 system.

- The message was delivered to the Information Exchange user's mailbox and was available to be received.

- The receive date and time when:

    - The receiver started receiving the message.

    - The receiver stopped receiving the message.

    - The message was committed by Information Exchange.

    - The message was purged from the mailbox, redirected, or received.

If the message is from an Information Exchange user to an X.400 user:
- The send date and time when:

    - The sender started sending the message.

    - The sender stopped sending the message.

    - The message was committed to Information Exchange.

    - The message was forwarded to the Information Exchange X.400 system. This value is set using information from the Information Exchange X.400 system.

        NOTE: For P35 messages, this time stamp is updated again when a Delivery Report (DR) is received from the trading partner's X.400 system using the date and time information from the DR.

- The receive date and time when:

    - The receiver started receiving the message.

        That is, when the receiver's X.400 system accepted or rejected the message from the Information Exchange X.400 system. This value is set using date and time information from the Information Exchange X.400 system.

    - The receiver stopped receiving the message.

        That is, when the receiver's X.400 system generated a positive DR, a positive EDI Notification (EDIN), a negative Delivery Report (NDR), or a negative EDIN.

        In the case of a positive DR or positive EDIN, this value is set using information from the DR or the positive EDIN.

        In the case of an NDR or a negative EDIN, this value is set using information from Information Exchange.

    - The message was committed by Information Exchange.

        That is, when Information Exchange accepted the delivery notification from the Information Exchange X.400 system.

    - The message was deleted from Information Exchange.

If the message is from an Internet user to an Information Exchange user:

- The send date and time when:

  - The sender started sending the message.

    That is, when the sender's SMTP system accepted the message from the sender (a user agent). This value is set using information from the incoming Internet message.

  - The sender stopped sending the message.

    That is, when the Information Exchange SMTP system accepted the message from the sender's SMTP system. This value is set using information from the Information Exchange SMTP system.

  - The message was committed to Information Exchange.

    That is, when Information Exchange accepted the message from the Information Exchange SMTP system.

  - The message was delivered to the Information Exchange user's mailbox and was available to be received.

- The receive date and time when:

  - The receiver started receiving the message.

  - The receiver stopped receiving the message.

  - The message was committed by Information Exchange.

  - The message was purged from the mailbox, redirected, or received.

If the message is from an Information Exchange user to an Internet user:

- The send date and time when:

  - The sender started sending the message.

  - The sender stopped sending the message.

  - The message was committed to Information Exchange.

  - The message was forwarded to the Information Exchange SMTP system. This value is set using information from the Information Exchange SMTP system.

- All receive dates and times are set when:

  - The Information Exchange SMTP system accepts the message from Information Exchange.

    This is because Delivery Reports are not requested for Internet messages so the message is deleted from Information Exchange as soon as the Information Exchange SMTP system accepts the message.

How to search for audit trails

To search for audit trails and minimize the receipt of unneeded data, you can specifically request audit trails for:

- A particular account ID and user ID

- All users in an account
  Type a question mark (**?**) in the "user ID" field.

- Messages sent to or received from a specific account ID and user ID
  Type the partner's ID in the form of a system ID, if applicable, an account ID, and user ID, or an alias reference.

- Messages sent to or received from all users in the account
  Type a question mark (**?**) in the user ID portion of the "Partner or alias" field to select all users in the partner's account.

- A specific user message class
  You can use a question mark (?) as a substitute for any character or characters; for example:

  - To select all that begin with *CLA*, type: **cla**?
  - To select all with user message classes that end with *004*, type: **?004**
  - To select all with user message classes that begin with **C** and end with 999, type: **c?999**

- All user message classes
  Leave the field blank.

- Messages in a certain status
  Use the following status codes in your search.

This value:	Means:
D	• Received • Transferred • Redirected
P	Purged
U	• In transit to another system • Queued • Forwarded • Mailboxed
b (blank)	All messages regardless of their status. This is the default.

■ A specific date and time, or dates and times
To further refine your search, use any of the following methods:

- To display the dates and times in another time zone, type a standard abbreviation or Greenwich mean time (GMT) offset for "Time zone." For a list of time zones and their abbreviations and offsets, see Appendix A, "Time zones."

- To look at audit trails for messages processed after a certain date and time, type a "Begin date-time" only.

- To look at audit trails for messages processed before a certain date and time, type an "End date-time" only.

- To look at audit trails for messages processed during a certain period of time, type both the "Begin date-time" and "End date-time".

When begin date criteria, end date criteria, or both, are requested for selecting audits, the audits are selected by looking at the following date and time fields in the audit record, depending on the type of audit requested:

- **Audit trail for "Sent" messages and "Carbon Copy as Partner"**

  The "Send date and time started" must be within the begin date criteria requested, the end date criteria requested, or both.

- **Audit trail for "Received or Receivable" messages**

  - If the message is received or purged, the "Received date and time purged/received" must be within the begin date criteria requested, the end date criteria requested, or both.

  - If the message is not received, the "Send date and time started" must be within the begin date criteria requested, the end date criteria requested, or both.

Audit trails and the cluster mailbox

Audit trails are owned by the parent user ID. You can select to browse or retrieve audit records for a specific child user ID.

On the Work with Audit Trails and Session Traces panel, you can enter either a parent user ID or a child user ID in the "Account ID" and "User ID" fields when you select any of the following actions:

- "Audit trail for received and receivable messages"
- "Audit trail for sent messages"
- "Audit trail for carbon copies as partner"
- "Retrieve the audit trail messages into your mailbox"

You cannot use a child user ID in the "Partner or alias" user ID field. If you use a parent user ID, audit trail information for all its associated child user IDs is selected.

How Information Exchange processes audit information

Information Exchange processes audit records asynchronously.

When you receive a message and commit its receipt through the checkpoint process or by ending the session, Information Exchange starts an asynchronous process to update the audit record for that message.

If you look at the audit trail for the message immediately after receiving it, the message might still seem to be in the mailbox. This is because the system has not yet completed the asynchronous processing that updates the audit record.

For more information on asynchronous processing, see "How Information Exchange processes mail tasks" on page 210.

Working with the audit trail for received and receivable messages

To work with audit trails for messages sent to a user, follow this path.

Choose Action 5

```
M0000US            Information Exchange Administration Services
                                Main Menu
                             System ID : SY1

  Action 5      Work with one of the following:
                   1. Profiles
                   2. Alias tables
                   3. Distribution lists
                   4. Messages
                   5. Audit trails and session traces
                   6. Trading partners
                   7. Libraries
```

Fill in the account ID and user ID you want. Fill in ? in the "user ID" field to get all users.

You can use these fields for your search

Choose Action 1

```
M5000US           Work with Audit Trails and Session Traces

Account ID / user ID....  ACCT1    / USER2
Time zone...............  EST
Partner or alias........  ___/___/_____ _____ or  ____
Begin date - time.......  __ / __ / __ - __ : __   Date format - MM/DD/YY
End date - time.........  __ / __ / __ - __ : __   Date format - MM/DD/YY
User message class......  _____
Message status..........  _            (D, P, U or blank)

                        Actions 1, 2 and 3 are BILLABLE

Action..... 1   1. Audit trail for received and receivable messages
                2. Audit trail for sent messages
                3. Audit trail for carbon copies as partner
                4. Retrieve the audit trail for messages into your mailbox
                5. Work with messages
                6. List session trace
                7. Retrieve the session trace into your mailbox
```

Fill in S if you want to see additional information about the audit trail

```
M3500US    Audit Trail for Received and Receivable Messages

Account ID / user ID....  ACCT1    / USER2      This is a BILLABLE function

Code (multiple selection):
  S = See additional information (BILLABLE)

      EDI ctrl ID or  User msg                    ------ Sent ------
Code   Msg name/seq   class     ------ Sender ID ------  Date      Time     S
 S   1234567801234    #EE       QUAL 17-BYTE SENDER ID   02/02/99  11:20:12  E
 _   12345678901234   #EE       QUAL 17-BYTE SENDER ID   02/05/99  08:30:06  M
 _   12345678901234   #EE       QUAL 17-BYTE SENDER ID   02/06/99  08:31:48  P
 _   SEND1234567890   #EU            14-BYTE SENDER ID   02/07/99  10:15:25  P
```

Find the audit trail for which you want additional information, type **s** next to it, and press Enter.

NOTE: You are charged for looking at the audit trail for received and receivable messages. You are also charged for looking at additional information.

For regular messages, you see a panel like this one and its associated fields.

The cluster child user ID that received the message diplays here

For a redirected message, this is the user ID that received the message

Here is the first page of the audit trail information

```
M3501US   Audit Information for the Received/Receivable Message  (Panel 1 of 2)

Account ID / user ID.... ACCT1    / USER2    This is a BILLABLE function
Cluster child ID.......   USER202

Sender's: ID..........................    ACCT1    USER3
          Alias reference.............
          System type / level.......... EXP/VM  / 440
Date and time purged or delivered...... 02/13/99  07:00:00
Message key........................... B1232FB2DF405AE4E2
Redirected to mailbox ID..............    ACCT1    USER4

Archive or session ID..          EDI control ID....... 12345678901234
User message name...... 12345678  Message sequence in..
User message class..... #EE       Network msg class.... S
IE output sequence..... 000000    Who pays?........... SENDER PAYS ALL
Number of msgs in group 00000001  Total size.......... 0000000272
Status of the message.. SENDER REDIRECT Purge reason........


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward
```

NOTE: The "Redirected to mailbox ID" field only displays if the account ID and user ID at the top of the panel is the requester of the carbon copy that caused the message to be redirected.

For carbon copy messages, you see this panel like this one and its associated fields.

This is the cluster child user ID that received the message

Here is the first page of the audit trail information

```
M3501US   Audit Information for the Received/Receivable Message  (Panel 1 of 2)

Account ID / user ID.... ACCT1    / USER2    This is a BILLABLE function
Cluster child ID.......   USER202

Sender's: ID..........................    ACCT1    USER3
          Alias reference.............
          System type / level.......... EXP/VM  / 440
Date and time purged or delivered...... 02/13/99 - 07:00:00
Message key........................... B1232FB2DF405AE4E2
Carbon copy partner's ID..............    ACCT1    USER4

Archive or session ID..          EDI control ID....... 12345678901234
User message name...... 12345678  Message sequence in.. 000001
User message class..... #EE       Network msg class.... S
IE output sequence..... 000000    CC type / data type.. RECV RED /NOT EDI
Number of msgs in group 00000001  Total size.......... 0000000272
Status of the message.. RCVR REDIRECT Purge reason........
Who pays CC processing? PARTNER    Who pays CC receive?. RECEIVER


Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward
```

NOTE: The "Carbon copy partner's ID" field displays only if the recipient is paying one or both of the carbon copy charges.

Press F8 to look at the next panel.

This panel and its associated fields display for both regular and carbon copy messages.

The second page shows the dates and times the message was sent, purged, or delivered

```
M3502US   Audit Information for the Received/Receivable Message  (Panel 2 of 2)


Account ID / user ID....  ACCT1    / USER2    This is a BILLABLE function
Cluster child ID........  USER202

Send:
  Date and time started.................. 02/02/99 11:20:12
  Date and time ended.................... 02/02/99 11:20:12
  Date and time committed................ 02/02/99 11:20:12
  Date and time mailboxed................ 02/02/99 11:20:13

Receive:
  Date and time started.................. 02/03/99 07:00:00
  Date and time ended.................... 02/03/99 07:00:00
  Date and time committed................ 02/03/99 07:00:00
  Date and time purged/delivered......... 02/03/99 07:00:00




Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward
```

For details about the fields on these panels, see "Looking at audit trail information" on page 247.

Working with the audit trail for sent messages

To work with audit trails for messages a user sent, follow this path.

Fill in the account ID and user ID you want. Fill in ? in the "user ID" field to get all users

You can use these fields for your search

Choose Action 2

```
M5000US           Work with Audit Trails and Session Traces

Account ID / user ID....  ACCT1    / USER3
Time zone...............  EST
Partner or alias........  ___ / ___ / ___ _____  or  ____
Begin date - time.......  __ / __ / __ - __ : __    Date format - MM/DD/YY
End date - time.........  __ / __ / __ - __ : __    Date format - MM/DD/YY
User message class......  _____
Message status..........  _         (D, P, U or blank)

                        Actions 1, 2 and 3 are BILLABLE

Action..... 2   1. Audit trail for received and receivable messages
                2. Audit trail for sent messages
                3. Audit trail for carbon copies as partner
                4. Retrieve the audit trail for messages into your mailbox
                5. Work with messages
                6. List session trace
                7. Retrieve the session trace into your mailbox
```

Fill in S if you want to see additional information about the audit trail

```
M3600US              Audit Trail for Sent Messages

Account ID / user ID....  ACCT1    / USER3      This is a BILLABLE function

Code (multiple selection):
 S = See additional information (BILLABLE)


     EDI ctrl ID or User msg                    ------ Sent ------
Code  Msg name/seq  class    ----- Receiver ID ----- Date      Time     S
S   SEND1234567890  #EU            ACCT1    USER2     02/03/99  11:02:21 P
_   SEND1234567890  #EU            ACCT1    USER2     02/04/99  08:30:31 P
_   12345678901234  #EE            ACCT1    USER2     02/04/99  10:15:38 P
_   SEND1234567890  #EU            ACCT1    USER2     02/05/99  11:17:17 P
```

Find the audit trail for which you want additional information, type **s** next to it, and press Enter.

NOTE: You are charged for looking at the audit trail for sent messages. You are also charged for looking at additional information.

For regular messages, you see a panel like this one and its associated fields.

This field displays for cluster user IDs and identifies the sending child user ID →

```
M3601US          Audit Information for the Sent Message      (Panel 1 of 2)

Account ID / user ID.... ACCT1    / USER3      This is a BILLABLE function
Cluster Child ID........ USER302

Receiver's: ID........................       ACCT1    USER2
            Alias reference...........
Sender's system type/level............ EXP/MVS / 440
Date and time purged or delivered...... 02/03/99 11:03:01
Message key........................... B15D30CDFFF978E4E2
Mailbag number........................

Archive or session ID..               EDI control ID....... SEND1234567890
User message name...... 00022223       Message sequence in.. 00001
User message class..... #EU            Network msg class.... S
IE output sequence..... 000000         Who pays?........... SENDER PAYS ALL
Number of msgs in group 00000001       Total size.......... 0000000939
Status of the message.. PURGED         Purge reason........ EXPIRE UNDELVRD




Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward
```

Here is the first page of the audit trail ⟶

For carbon copy messages, you see a panel like this one and its associated fields.

This field displays for cluster user IDs and identifies the sending child user ID →

```
M3601US          Audit Information for the Sent Message      (Panel 1 of 2)

Account ID / user ID.... ACCT1    / USER3      This is a BILLABLE function
Cluster Child ID........ USER302

Receiver's: ID........................       ACCT1    USER2
            Alias reference...........
Sender's system type/level............ EXP/MVS / 440
Date and time purged or delivered...... 02/03/99 11:03:01
Message key........................... B15D30CDFFF978E4E2
Mailbag number........................
Carbon copy partner ID................       ACCT1    USER4
Archive or session ID..               EDI control ID....... SEND1234567890
User message name...... 00022223       Message sequence in.. 00001
User message class..... #EU            Network msg class.... S
IE output sequence..... 000000         CC type / data type.. SEND CC / NOT EDI
Number of msgs in group 00000001       Total size.......... 0000000939
Status of the message.. PURGED         Purge reason........ EXPIRE UNDELVRD
Who pays CC processing? PARTNER        Who pays CC receive?. RECEIVER



Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward
```

Here is the first page of the audit trail ⟶

Press F8 to look at the second panel.

This panel and the associated fields display for both regular and carbon copy messages.

```
M3602US          Audit Information for the Sent Message      (Panel 2 of 2)

Account ID / user ID.... ACCT1    / USER2      This is a BILLABLE function


Send:
  Date and time started..................... 02/03/99 11:02:21
  Date and time ended....................... 02/03/99 11:02:22
  Date and time committed................... 02/03/99 11:02:22
  Date and time queued/forwarded/mailboxed.... 02/03/99 11:02:23

Receive:
  Date and time started..................... 02/04/99 11:03:00
  Date and time ended....................... 02/04/99 11:03:00
  Date and time committed................... 02/04/99 11:03:01
  Date and time purged/delivered............. 02/04/99 11:03:01




Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward
```

The second page shows the dates and times the message was sent, purged, or delivered ⟶

For details about the fields on these panels, see "Looking at audit trail information" on page 247.

Working with carbon copy as partner audits

This audit is only created if the carbon copy partner is identified as paying at least one of the carbon copy charges.

This audit is owned by the carbon copy partner and shows the carbon copy requester and the carbon copy recipient.

To work with Carbon Copies as Partner audit trails, follow this path.

Fill in the account and user ID you want. Fill in ? in the "user ID" field to get all users.

You can use these fields for your search

Choose Action 3

```
M5000US            Work with Audit Trails and Session Traces

Account ID / user ID....  ACCT1    / USER3
Time zone...............  EST
Partner or alias........  ___/____/__ _____ or ____
Begin date - time.......  __ / __ / __ - __ : __   Date format - MM/DD/YY
End date - time.........  __ / __ / __ - __ : __   Date format - MM/DD/YY
User message class......  _____
Message status..........  _           (D, P, U or blank)

                         Actions 1, 2 and 3 are BILLABLE

Action..... 3   1. Audit trail for received and receivable messages
                2. Audit trail for sent messages
                3. Audit trail for carbon copies as partner
                4. Retrieve the audit trail for messages into your mailbox
                5. Work with messages
                6. List session trace
                7. Retrieve the session trace into your mailbox
```

Fill in S if you want to see additional information about the audit trail

```
M3900US           Audit Trail for Carbon Copies as Partner

Account ID / user ID....  ACCT1    / USER4      This is a BILLABLE function

Code (multiple selection):
  S = See additional information (BILLABLE)

      EDI ctrl ID or  User msg                    ------ Sent ------
Code   Msg name/seq   class    --- Requester ID ----- Date     Time      S
  S                   MCLASS1      ACCT1    USER5     02/12/99  10:55:24  M
  _                   MCLASS2      ACCT1    USER5     02/12/99  13:11:40  P
  _                   MCLASS3      ACCT1    USER6     02/14/99  08:03:41  P
  _                   MCLASS4      ACCT1    USER5     02/14/99  08:07:40  P
  _                   MCLASS5      ACCT1    USER5     02/15/99  12:18:43  P
```

Find the audit trail for which you want additional information, type **s** next to it, and press Enter.

NOTE: You are charged for looking at the audit trail for carbon copy as partner messages. You are also charged for looking at additional information.

You see panels like these.

Here is the first page of the audit trail information for Carbon Copy as Partner

```
M3901US    Audit Information for the Carbon Copy as Partner    (Panel 1 of 2)

Account ID / user ID.... ACCT1    / USER4       This is a BILLABLE function


Carbon copy requester's ID.............     ACCT1    USER5
Date and time purged or delivered...... 02/13/99  17:17:19
Message key.......................... B0A6FBC28D345FE4E2
Carbon copy recipient's ID.............     ACCT1    USER1

Archive or session ID..             EDI control ID.......
User message name......              Message sequence in..
User message class..... MCLASS1      Network msg class.... S
IE output sequence..... 000000       CC type / data type.. SEND CC  /NOT EDI
Number of msgs in group 00000001     Total size.......... 0000000079
Status of the message.. IN MAILBOX   Purge reason........
Who pays CC processing? PARTNER      Who pays CC receive?. RECEIVER




Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward
```

The second page shows the dates and times the carbon copy message sent, purged, or delivered

```
M3902US    Audit Information for the Carbon Copy as Partner    (Panel 2 of 2)

Account ID / user ID.... ACCT1    / USER2       This is a BILLABLE function


Send:
  Date and time started...................... 02/12/99 10:55:24
  Date and time ended........................ 02/12/99 10:55:24
  Date and time committed.................... 02/12/99 10:55:24
  Date and time queued/forwarded/mailboxed.... 02/12/99 10:55:25

Receive:
  Date and time started...................... 02/12/99 11:17:19
  Date and time ended........................ 02/12/99 11:17:19
  Date and time committed.................... 02/12/99 11:17:20
  Date and time purged/delivered............. 02/12/99 11:17:21




Command ===>
Enter  F1=Help  F3=Exit  F4=Main Menu  F7=Backward
```

For details about the fields on these panels, see "Looking at audit trail information" on page 247.

Retrieving an audit trail into a mailbox

You can retrieve audit trails into your mailbox. When you request to retrieve audit trails, Information Exchange generates a message that contains those audit records. When you receive that message from your mailbox, you incur Information Exchange charges.

Refer to *Information Exchange Messages and Formats* or to the *Information Exchange Interface Programming Guide* for a description of the format of the message generated by an audit retrieve request.

You can select the audits by following the same procedures specified under "How to search for audit trails" on page 255.

NOTE: If you specified a question mark (**?**) for the user ID on the Work with Audit Trails and Session Traces panel, the user ID will display as blank on the Retrieve the Audit Trail for Messages into Your Mailbox panel.

When you press F3, Information Exchange retrieves the audit trail to the logged on user's mailbox.

To retrieve audit trails into the logged on user's mailbox, follow this path.

Fill in the account and user ID you want. Fill in ? in the "user ID" field to get all users.

You can use these fields for your search

Choose Action 4

```
M5000US            Work with Audit Trails and Session Traces

Account ID / user ID....  ACCT1    / USER3
Time zone...............  EST
Partner or alias........  ___ ACCT1    ?_____  or  _____
Begin date - time.......  02 / 15 / 99 - __ : __   Date format - MM/DD/YY
End date - time.........  02 / 16 / 99 - __ : __   Date format - MM/DD/YY
User message class......  FFMSG001
Message status..........  D          (D, P, U or blank)

                       Actions 1, 2 and 3 are BILLABLE

Action..... 4   1. Audit trail for received and receivable messages
                2. Audit trail for sent messages
                3. Audit trail for carbon copies as partner
                4. Retrieve the audit trail for messages into your mailbox
                5. Work with messages
                6. List session trace
                7. Retrieve the session trace into your mailbox
```

For example, to retrieve the audit trail for messages that ACCT1/USER3 exchanged with all users in account ACCT1, type a question mark (**?**) in the Partner's "User ID" field.

You see a panel like this one.

```
M3700US     Retrieve the Audit Trail for Messages into Your Mailbox

Account ID / user ID..............  ACCT1  /   USER3
Partner's:
  Sys ID / Account ID / User ID....    / ACCT1 / ?
  Alias reference..................
Begin date - time.................. 02/15/99 -  :
End date - time.................... 02/16/99 -  :
User message class / message status FFMSG001 / D

Retrieve the audit trail for (Y/N):
  Received and receivable messages?....... _
  Sent messages? ......................... _
  Carbon copies as partner?.............. _

Include (Y/N):
  Extended time fields?.................. _
  EDI control ID?........................ _
  Carbon copy fields and miscellaneous?... _
```

Specify at least one of these

These are optional

You can request any of the following for the "Retrieve the audit trail for" fields:

■ For receivable audits only, specify **y** in the "Received and receivable messages?" field.

■ For sent audits only, specify **y** in the "Sent message?" field.

■ For carbon copy as partner audits only, specify **y** in the "Carbon copies as partner?" field.

■ For both sent and receivable audits, specify **y** in both the "Received and receivable messages?" field and the "Sent messages?" field.

■ For all audits, specify **y** in the "Received and receivable messages?", "Sent messages?", and "Carbon copies as partner?" fields.

You can request any of the following for the "Include" fields:

■ If you specify **y** in the "EDI control ID" field, then you must specify **y** in the "Extended time fields?".

■ If you specify **y** in the "Carbon copy fields and miscellaneous?" field, then you must specify **y** in both the "Extended time fields?" and the "EDI control ID?" fields.

Here is an example of how the retrieved audit trail looks on a list of inbound messages.

Here is a retrieved audit trail on a list of inbound messages →

```
M3100US                        List Inbound Messages

Account ID.............   ACCT1
User ID................   USER4

Codes (multiple selection)
  D = Delete message    H = View common data header    M = Hold in mailbox
  R = Remove hold       S = See additional information  V = View text (BILLABLE)

         --------- Sender ---------  User msg  --- Submitted ----  Rcv  Arch  CDH
Code  Sys ID  Account    User ID     class     Date      Time      ind  ind   ind
  _           *SYSTEM*   *AUDITS*    #SAUDIT   02/15/99  16:15:37
```

The retrieved audit data includes the following information:

■ Account ID and user ID of the record owner
■ Type of audit record
■ Trading partner ID
■ Internal Information Exchange message group identifier
■ Status flag
■ Status phrase
■ Purge reason code
■ Purge phrase
■ Alias reference to trading partner
■ Message priority
■ Network message class
■ User message class
■ User message name
■ Message sequence
■ Sender's system type
■ Sender's system level
■ Number of messages in message group
■ Total text size
■ Receiver's archive ID for message
■ Date and time sent
■ Date and time received or purged
■ Message output sequence number
■ Data type
■ EDI sender ID
■ EDI sender ID qualifier
■ EDI receiver ID
■ EDI receiver ID qualifier
■ EDI message ID

If you typed **y** next to "Extended time fields?", you get the date and time when:

■ The sender started and stopped sending the message
■ The message was committed to Information Exchange
■ The message was routed
■ The receive started and ended
■ The receive was committed to Information Exchange

If you typed **y** next to "EDI exchange control ID", the audit data will include this field.

If you typed **y** next to "Carbon copy and other miscellaneous fields", the audit data will include the following:

- Cluster child ID
- Who pays? (resolved message charge)
- Mailbag number
- Total size of message received
- Total size of message sent
- Who pays carbon copy processing charge
- Who pays carbon copy receive-side charge
- Message type (CC type)
- Third party ID type
  The type of ID returned in the "Third party ID type" field is identified as one of the following:

  - Alias reference
  - EDI reference ID
  - Information Exchange address in the form of a system ID (if applicable) account ID, and user ID
  - Blanks

- Third party ID
  The "Third party ID" field is identified as one of the following:

  - Carbon copy partner ID
  - Carbon copy recipient
  - Redirected to mailbox ID

For more information about the audit record format and the information returned in the audit record fields, see the *Information Exchange Messages and Formats*, or the *Information Exchange Interface Programming Guide*.

Understanding session and receive traces

Session traces provide information about users' sessions with Information Exchange. Receive traces provide information about receive commands issued during a user's session with Information Exchange.

When you request session or receive traces to be sent to your mailbox, you generate an Information Exchange message that contains those session or receive traces. When you receive that message from your mailbox, you incur Information Exchange charges.

NOTE: There is no charge for looking at session or receive traces.

Looking at session trace information

Here is the information included in the session trace.

- **Session access key**
  This is the Information Exchange access key associated with the user during a session.

- **Session start date/Session start time**
  This is the start date and time of the Information Exchange session.

- **Session start response code**
  For information on session response codes, refer to *Information Exchange Administration Services Messages and Codes*.

- **Session end date/Session end time**
  This is the end date and time of the Information Exchange session.

- **Session end response code**
  For information on session response codes, see *Information Exchange Administration Services Messages and Codes*.

- **Recovery level**
  The valid values are:
  - **C** for checkpoint
  - **G** for group
  - **M** for message
  - **S** for stream
  - **X** for session

- **System type/System level**
  This is the type and level of system the session was on.

- **Transmission size**
  This tells you the maximum message size that the user's system can receive.

- **Messages sent/Message received**
  This tells you the number of messages sent and received during the session. The values in these fields include the CDH.

- **Expansion level**
  This shows you what was specified in the "Expand" field in the session start command.

- **Send chkpt number expected/number received**
  This tells you the send checkpoint number that was expected and the number that was received (if the session was activated through the session control feature).

- **Recv chkpt number expected/number received**
  This tells you the receive checkpoint number that was expected and the number that was received (if the session was activated through the session control feature).

- **Customer LU / Front end LU**
  These are the logical unit names for the customer's system and the Information Exchange front end.

- **Session ended by**
  This tells you the reason the session was ended.

Looking at receive trace information

Here is the information in a receive trace.

- **Session access key**
  This is the Information Exchange access key associated with this receive request.

- **Receive start date - time**
  This is the date and time the receive request started.

- **Reference ID**
  This is the command reference name.

- **Source**
  The source is the criteria for the message sender, specified in the receive request. If this field is blank, no criteria was specified; otherwise, it contains one of the following:

  - An alias reference
  - A distribution list
  - A system ID, if applicable, an account ID, and user ID

- **User message class**
  This is the user message class specified in the receive request. This field is blank, if no user message class was specified.

- **Expansion level**
  This shows you what was specified in the "Expand" field in the receive request.

- **Type of receive**
  This is the type of receive operation specified in the receive request. The valid values are:

  - **C** for continuous receive
  - **E** for end a prior continuous receive
  - **G** for single group receive
  - **W** for wait-to-receive operation
  - **Blank** for batch receive

■ **Receive EDI option**
This is the EDI receive option specified in the receive request. The valid values are:

- **E** for only EDI formatted data requested
- **N** for only non-EDI formatted data requested
- **Blank** for both EDI and non-EDI formatted data requested

■ **Archive reference**
This contains the archive reference specified in the receive request.

■ **Specific receive message key**
This indicates the message key specified in the receive request, if any.

How to search session and receive traces

To search for session and receive traces and minimize the receipt of unneeded data, you can specifically request session and receive traces for:

■ A particular account ID and user ID

■ All users in an account
Type a system ID, if applicable, an account ID, and type a question mark (**?**) in the "user ID" field.

■ A specific date and time, or dates and times
To further refine your search, use any of the following methods:

- To display the dates and times in another time zone, type a standard abbreviation or Greenwich mean time (GMT) offset for "Time zone." For a list of time zones and their abbreviations and offsets, see Appendix A, "Time zones."

- To look at session and receive traces for messages processed after a certain date and time, type a "Begin date-time" only.

- To look at session and receive traces for messages processed before a certain date and time, type an "End date-time" only.

- To look at session and receive traces for messages processed during a certain period of time, type both the "Begin date-time" and "End date-time".

If you want to specify a time, you must specify a date. If you want to specify a date, you do not need to specify a time.

Session and receive traces and the cluster mailbox

Session traces are associated with the child user ID. A parent user ID or a child user ID can be entered in the "User ID" field on the Work with Audit Trails and Session Traces panel when you select the following actions:

■ List session trace
■ Retrieve the session trace into your mailbox

If you enter a parent user ID, session trace information for all its associated child user IDs is selected.

Working with session trace information

Session traces give you information about the status of a user's sessions.

To work with session trace information, follow this path.

Fill in the account and
user ID you
want, or fill in ? in the
"user ID" field to get
all users.

Use these fields to
narrow your search

Choose Action 6

```
M5000US           Work with Audit Trails and Session Traces

Account ID / user ID....  ACCT1      / USER2
Time zone...............  EST
Partner or alias........  __/__/__ - __ : __     or   ____
Begin date - time.......  __ / __ / __ - __ : __   Date format - MM/DD/YY
End date - time.........  __ / __ / __ - __ : __   Date format - MM/DD/YY
User message class......  _____
Message status.........   _            (D, P, U or blank)

                        Actions 1, 2 and 3 are BILLABLE

Action..... 6   1. Audit trail for received and receivable messages
                2. Audit trail for sent messages
                3. Audit trail for carbon copies as partner
                4. Retrieve the audit trail for messages into your mailbox
                5. Work with messages
                6. List session trace
                7. Retrieve the session trace into your mailbox
```

Fill in S to get
additional information
about the session

```
M5400US                    List Session Trace

  Account ID..............  ACCT1
  User ID.................  USER2

  Code (multiple selection):
    S = See additional information
                             Receive or
               Session   ----- Session Start -----   ------ Session End -------
  Code Function Access key  Time     Date     Resp    Time     Date     Resp
  S    Session  SU1U72TJ  13:47:45 02/15/99  00000  13:49:21 02/15/99  00000
  _    Session  SU1U9N1Y  15:45:13 02/15/99  00000  15:50:23 02/15/99  00000
  S    Session  SU1V1FCU  15:54:35 02/15/99  00000  15:56:37 02/15/99  00000
  _    Session  SU1V3DGO  16:31:57 02/15/99  00000  16:33:23 02/15/99  00000
  _    Session  SWAFRA12  16:35:04 02/15/99  00000  16:54:37 02/15/99  00000
```

For session records, if the session end date and time are blank, the session is still active, or another session was started with the same account and user ID before the previous session ended.

Find the trace you want, type **s** next to it, and press Enter.

When working with session traces, the date and time you request is matched against the session start date and time.

You see a panel like this one.

These fields give you
additional information
about the session

```
M5410US                 Information about a Session

  Account ID.............  ACCT1
  User ID.................  USER2

  Session access key...........................  SU1U72TJ
  Session start date / Session start time........  02/15/99 / 13:47:45
  Session start response code....................  00000
  Session end date / Session end time............  02/15/99 / 13:49:21
  Session end response code......................  00000
  Recovery level.................................
  System type / System level.....................  EKP/VM   /  410
  Transmission size..............................  00254
  Messages sent / Messages received..............  000002 / 000002
  Expansion level................................
  Send chkpt number expected / number received...  00002 / 00002
  Recv chkpt number expected / number received...  00002 / 00002
  Customer's LU name / Front end LU name.........  LUNAME / FELUNAME
  Session ended by...............................


  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F8=Forward
```

For information on session trace fields, see "Looking at session trace information" on page 268. For information on session response codes, see *Information Exchange Administration Services Messages and Codes*.

Working with receive trace information

Receive traces give you information about the status of receive commands that a user has issued.

To work with receive trace information, follow this path.

Fill in the account and/or user ID you want. Fill in ? in the "user ID" field to get all users.

Use these fields to narrow your search

Choose Action 6

```
M5000US              Work with Audit Trails and Session Traces

Account ID / user ID....  ACCT1    / USER2
Time zone...............  EST
Partner or alias........  _____ _____ or  _____
Begin date - time.......  __ / __ / __ - __ : __   Date format - MM/DD/YY
End date - time.........  __ / __ / __ - __ : __   Date format - MM/DD/YY
User message class......  _____
Message status..........  _             (D, P, U or blank)

                         Actions 1, 2 and 3 are BILLABLE

Action..... 6   1. Audit trail for received and receivable messages
                2. Audit trail for sent messages
                3. Audit trail for carbon copies as partner
                4. Retrieve the audit trail for messages into your mailbox
                5. Work with messages
                6. List session trace
                7. Retrieve the session trace into your mailbox
```

Fill in S to get additional information about the receive

```
M5400US                        List Session Trace

  Account ID..............  ACCT1
  User ID.................  USER2

  Code (multiple selection):
    S = See additional information
                                     Receive or
                Session  ----- Session Start -----  ------ Session End -------
  Code Function Access key  Time     Date     Resp    Time     Date     Resp
  S  Receive   SU1U72TJ  13:47:45 02/15/99   N/A     N/A      N/A     00000
  S  Receive   SU1U9N1Y  15:45:13 02/15/99   N/A     N/A      N/A     00000
```

Find the receive trace you want, type **s** next to it, and press Enter.

NOTE: The "Receive or Session Start" response code and the "Session End" time and date are not applicable for receive traces, so these fields display as N/A on the List Session Trace panel.

You see a panel like this one.

These fields give you additional information about the receive

```
M5420US                    Information about a Receive

  Account ID..............  ACCT1
  User ID.................  USER2

  Session access key....................  SU1U72TJ
  Receive start date - time.............  02/15/99 - 13:47:45
  Reference ID..........................
  Source:
    System ID - Account ID - User ID...  - ACCT1    - USER4
    List name...........................
    Alias type - table - name..........  -      -
  User message class....................  #EU
  Expansion level.......................
  Type of receive.......................
  Receive EDI option....................
  Archive reference.....................
  Specific receive message key..........



  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu
```

For information on receive trace fields, see "Looking at receive trace information" on page 269.

Retrieving session and receive traces into your mailbox

To retrieve a trace for a user's sessions and receives, follow this path.

Fill in the account and/
or user ID you want,
or fill in ? in the "user
ID" field to get all
users.

Use these fields to
narrow your search

Choose Action 7

```
M5000US              Work with Audit Trails and Session Traces

Account ID / user ID....  ACCT1    / USER2
Time zone..............  EST
Partner or alias........  ___ / ___ / ___ _____  or  _____
Begin date - time.......  __ / __ / __ - __ : __   Date format - MM/DD/YY
End date - time.........  __ / __ / __ - __ : __   Date format - MM/DD/YY
User message class......  _____
Message status..........  _              (D, P, U or blank)

                         Actions 1, 2 and 3 are BILLABLE

Action..... 7   1. Audit trail for received and receivable messages
                2. Audit trail for sent messages
                3. Audit trail for carbon copies as partner
                4. Retrieve the audit trail for messages into your mailbox
                5. Work with messages
                6. List session trace
                7. Retrieve the session trace into your mailbox
```

Fill in Y and press F3 or
F4

```
M5500US           Retrieve the Session Trace into Your Mailbox

    Account ID.............  ACCT1
    User ID................  USER2
    Begin date - time.......
    End date - time........

  Do you want to retrieve this session trace? (Y/N)...  Y
```

To retrieve a trace, type **y** and press F3. Information Exchange sends traces to the logged on user's mailbox.

Here is an example of how the retrieved trace looks on a list of inbound messages.

Here is a session trace on
a list of inbound
messages

```
M3100US                      List Inbound Messages

   Account ID..............  ACCT1
   User ID.................  USER2

   Codes (multiple selection)
     D = Delete message   H = View common data header    M = Hold in mailbox
     R = Remove hold      S = See additional information  V = View text (BILLABLE)

       --------- Sender ---------  User msg  --- Submitted ----  Rcv  Arch  CDH
  Code Sys ID  Account  User ID    class     Date      Time      ind  ind   ind
   _           *SYSTEM* *EVENTS*   #STRACE   02/20/99  16:20:13                Y
```

Helping users with problems

As the Information Exchange Service Administrator, you can help users when they have problems with Information Exchange.

For example, if a user forgets a password and cannot sign on, or if an Extended Security Option (ESO) user has a user ID revoked after entering it incorrectly three times, you can reset the user's password.

If there is a problem that makes it impossible to continue the session, and normal recovery is not adequate, you can reset a user's session.

If a user suddenly loses an Information Exchange session, you can view the information about that last session.

This chapter covers the following:

Changing a user's password

General users can change their own passwords, or you can change their passwords for them.

> NOTE: Cluster user ID passwords are owned by the child user ID. Change passwords at the child level, not at the parent level.

If the user whose password is being changed is an ESO user, the password must comply with ESO password rules. For more information on ESO password rules, see "ESO password rules" on page 279.

You may want to set up stricter security for some users. See "Setting up stricter security" on page 10, for more information.

When you change a user's password, Information Exchange saves the date and time the password was last changed and displays this information on the "Information about Last Active User Session" panel.

To change a password for a user, follow this path.

```
M0000US          Information Exchange Administration Services
                              Main Menu
                           System ID : SY1

   Action 1     Work with one of the following:
                1. Profiles
                2. Alias tables
                3. Distribution lists
                4. Messages
```

Choose Action 1

Fill in the ID of the user whose password you want to change

```
M1000US                        Work with Profiles

   Account ID.............  ACCT1    (actions 5 - 8)
   User ID................  USER1    (actions 5 - 8)

   Action................. 5    1. List system IDs
                                2. Work with account profiles
                                3. List user IDs
                                4. Work with user profiles
                                5. Change a user's password
                                6. Reset a user's password
                                7. Reset a user's session
                                8. Information about last active user session
                                9. Work with messages
```

Choose Action 5

Fill in the user's current password

Fill in the new password twice

```
M1700US                    Change a User's Password

     Account ID.............  ACCT1
     User ID................  USER1

     Current Information Exchange password......

     New Information Exchange password.........

     Verify new Information Exchange password...
```

For security reasons, what you are typing does not display.

When you finish, press Enter, F3, or F4.

> NOTE: If you leave the fields blank and press Enter, F3, or F4, the password is not changed.

Information Exchange Administration Services verifies what you entered and, if everything is correct, changes the password.

Resetting a user's password

There are several reasons why a user's password may need to be reset. For example, a non-ESO user might forget the password and then cannot log on to Information Exchange. Or, if you are working with an ESO user, the password must be reset or changed before the user logs on to Information Exchange Administration Services for the first time or starts a session with Information Exchange for the first time. You might also have to reset a password for an ESO user when the user's ID is revoked after the ESO user enters it incorrectly three times.

> NOTE: Cluster user ID passwords are owned by the child user ID. Reset passwords at the child level, not at the parent level.

For ESO users, you reset a password by giving the user a new password, which must comply with ESO password rules. For more information on ESO password rules, see "ESO password rules" on page 279.

You may want to set up stricter security for some users. See "Setting up stricter security" on page 10, for more information.

When you reset a user's password, Information Exchange saves the date and time the password was reset and displays this information on the "Information about Last Active User Session" panel.

The following sections explain how to reset both non-ESO and ESO users' passwords.

Resetting a non-ESO user's password

To reset a non-ESO user's password, follow this path.

Fill in the ID of the user whose password you want to reset

Choose Action 6

```
M1000US                      Work with Profiles

  Account ID.............. ACCT1    (actions 5 - 8)
  User ID................. USER1    (actions 5 - 8)

  Action.................  6    1. List system IDs
                                2. Work with account profiles
                                3. List user IDs
                                4. Work with user profiles
                                5. Change a user's password
                                6. Reset a user's password
                                7. Reset a user's session
                                8. Information about last active user session
                                9. Work with messages
```

You see a panel like this one.

Fill in Y and press F3 to reset the password

```
M1500US                 Reset a User's Password

  Account ID.............. ACCT1
  User ID................. USER1

Do you want to reset the user's password? (Y/N)...  Y
```

When you finish, press Enter, F3, or F4.

> NOTE: If you type anything other than **y** or **n** or leave the field blank and press F3, F4, or F12, the password is not reset.

The password is reset to the user ID. You should remind the user to set a new password the next time the user logs on.

Resetting an ESO user's password

To reset an ESO user's password, follow this path.

Fill in the ID of the user whose password you want to reset

Choose Action 6

```
M1000US                     Work with Profiles

  Account ID.............  ACCT1   (actions 5 - 8)
  User ID................  USER1   (actions 5 - 8)

  Action................  6    1. List system IDs
                               2. Work with account profiles
                               3. List user IDs
                               4. Work with user profiles
                               5. Change a user's password
                               6. Reset a user's password
                               7. Reset a user's session
                               8. Information about last active user session
                               9. Work with messages
```

You see a panel like this one.

Fill in a new password twice for the ESO user

```
M1510US                Reset an ESO User's Password

    Account ID.............  ACCT1
    User ID................  USER1

  New Information Exchange password.........

  Verify new Information Exchange password...
```

Type the new password, type it again for verification, and then press Enter. The ESO user will use the password you typed the next time the user logs on.

For security reasons, what you are typing does not display.

When you finish, press Enter, F3, or F4.

NOTE: If you leave the fields blank and press Enter, F3, or F4, the password is not reset.

Information Exchange Administration Services verifies what you entered and, if everything is correct, resets the password.

ESO password rules

ESO users' passwords must comply with the following ESO password rules. The password:

- Must not contain the user ID as any part
- Must be at least six characters in length
- Must contain at least three different characters
- Must contain a nonnumeric first and last character
- Must contain at least one non-alphabetic character
- Must contain at least one alphabetic character
- Must contain only the valid characters A-Z, 0-9, and special characters #, @, and $
- Must be different from the current and five previous passwords
- Must not contain more than two identical consecutive characters
- Must not contain more than three identical, consecutive characters from the previous password

Resetting a user's session

You may have to reset a session if the user has problems that keep the user from logging on again or from continuing to work in the system. Resetting a session is actually resetting all the session statistics so a new session can begin. The following is true when a session is reset:

- Any messages in the process of being sent are deleted from Information Exchange.

- Any messages in the process of being received remain in the mailbox, and the user can receive them in the next session with Information Exchange.

To allow general users to reset their own sessions, make sure the "Reset session" field in the user profile is set to **y**.

NOTE: When working with cluster users, only a child user ID can have a session reset.

To reset a user's session, follow this path.

Fill in the ID of
the user whose session
you want
to reset

Choose Action 7

```
M1000US                          Work with Profiles

    Account ID.............  ACCT1    (actions 5 - 8)
    User ID................  USER1    (actions 5 - 8)

    Action................  7    1. List system IDs
                                 2. Work with account profiles
                                 3. List user IDs
                                 4. Work with user profiles
                                 5. Change a user's password
                                 6. Reset a user's password
                                 7. Reset a user's session
                                 8. Information about last active user session
                                 9. Work with messages
```

Fill in Y to verify
that you want to reset
the session

```
M1600US                    Reset a User's Session

      Account ID.............  ACCT1
      User ID................  USER1

      Do you want to reset user's session? (Y/N)...  Y
```

To confirm that you want to reset the session, type **y**, and then press Enter, F3, or F4.

To cancel the reset, type **n**, and then press Enter, F3, F4, or F12.

NOTE: If you type anything other than **y** or **n** or leave the field blank and press F3, F4, or F12, the session is not reset.

Information Exchange Administration Services resets the session so that the user can begin again.

Viewing a user's last active session

You can view information about the last Information Exchange session for a user.

Looking at the information about an active session

Here is the information that displays on the Information about an Active User Session panel.

■ **Session access key**
This is the Information Exchange access key associated with the last session for the user.

■ **Recovery level**
This is the recovery level used for the last session. The valid values are:

• **C** for checkpoint
• **G** for group
• **M** for message
• **S** for stream
• **X** for session

■ **Maximum message size**
This is the maximum message size specified in the session start request.

■ **Last Active:**
• Start date and time
The date and time when the last session started.

• End date and time
The date and time when the last session completed, or zeros, if the session has not ended.

■ **Front end LU name /Customer's LU name**
These are the logical unit (LU) names for the Information Exchange front end and the customer's system.

■ **Terminal ID/Logical terminal ID**
This is the terminal ID associated with the Information Exchange front end LU name and the customer's LU name.

■ **User system type/System level**
This is the system type and system level of the user's Information Exchange interface, such as Expedite Base/MVS.

■ **Session termination code**
This is the code assigned by Information Exchange when the session is complete. See the *Information Exchange Administration Services Messages and Codes*, for more detail on session codes.

■ **Type of line connection**
This displays LEASED, if the customer has a leased line connection, or SWITCHED, if the customer dials in to the network.

■ **Date and time password last changed**
This is the date and time that the user's password was last changed or reset (adjusted to the date format and time zone preferences specified in the user's profile).

■ **Date and time of last activity**
This is the date and time when the last activity occurred during the session (adjusted to the date format and time zone preferences specified in the user's profile).

To view an active user session, follow this path.

Fill in the account
ID and the user ID
of the user whose
last session you
want to view

Choose Action 8

```
M1000US                    Work with Profiles

  Account ID.............  ACCT1    (actions 5 - 8)
  User ID................  USER1    (actions 5 - 8)

  Action.................  8    1. List system IDs
                                2. Work with account profiles
                                3. List user IDs
                                4. Work with user profiles
                                5. Change a user's password
                                6. Reset a user's password
                                7. Reset a user's session
                                8. Information about last active user session
                                9. Work with messages
```

You see a panel like this one. The field descriptions are on the previous page.

The panel displays with
information
about the user's last
Information Exchange
session

```
M6100US          Information about Last Active User Session

    Account ID......................  ACCT1
    User ID.........................  USER1

    Session access key..................  SU1U72TJ
    Recovery level.....................  C
    Maximum message size...............  00344
    Last Active:
        Start date and time.............  02/20/99    13:40:45
        End date and time...............  02/20/99    15:40:45
    Front end LU name/Customer's LU name FELUNAME / LUNAME
    Terminal ID/Logical terminal ID.....  TERMID   / LTERMID
    User system type/System level.......  EXP/MVS  / 410
    Session termination code............  00000
    Type of line connection.............  LEASED
    Date and time password last changed. 01/26/99 / 13:48:00
    Date and time of last activity......  02/20/99 / 15:20:00


  Command ===>
  Enter  F1=Help  F3=Exit  F4=Main Menu  F12=Cancel
```

Time zones

∙ ∙

This appendix lists the time zones, their abbreviations, and their offsets from Greenwich mean time (**GMT**).

Today, Coordinated Universal Time (UTC or UT) has replaced GMT as the worldwide time reference. The two are identical for all practical purposes.

An offset is a designation east or west of GMT. For example:

This offset:	Designates:
E0130	1.5 hours east of Greenwich mean time.
W1030	1.5 hours west of Greenwich mean time.

Information Exchange stores time in GMT format. The "Time zone" field affects only the time displayed on the Information Exchange Administration Services panels, not the time stored in Information Exchange.

Time zone:	GMT Offset:	Description:
EAD	E1000	Eastern Australia daylight
JST	E0900	Japan standard time
WED	E0200	Western Europe daylight
EMT	E0200	Eastern Mediterranean time
BST	E0100	British summer time
WES	E0100	Western Europe standard
GMT	E0000	Greenwich mean time
UTC	E0000	Coordinated Universal time

Time zone:	GMT Offset:	Description:
AST	W0400	Atlantic standard time
EDT	W0400	Eastern daylight time
EST	W0500	Eastern standard time
CDT	W0500	Central daylight time
CST	W0600	Central standard time
MDT	W0600	Mountain daylight time
MST	W0700	Mountain standard time
PDT	W0700	Pacific daylight time
PST	W0800	Pacific standard time
YDT	W0800	Alaska daylight time
YST	W0900	Alaska standard time
AHD	W1000	Hawaii standard time
AHS	W1000	Hawaii standard time

Glossary

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This glossary defines words as they are used in this book. This glossary includes terms and definitions from:

The American National Dictionary for Information Systems, ANSI x3.172-1990, copyright 1990 by the American National Standards Institute (ANSI). Copies may be purchased from the American Standards Institute, 11 West 42 Street, New York, New York 10036. Definitions are identified by the symbol (A) after the definition.

The Information Technology Vocabulary, developed by Subcommittee 1, Joint Technical Committee 1, of the International Organization for Standardization and the International Electrotechnical Commission (ISO/IEC JTC1/SC1). Definitions of published parts of this vocabulary are identified by the symbol (I) after the definition.

A

access point. The geographical location through which an event occurs.

account. A unique identifier assigned to a group of users.

account ID. A name that identifies an account to a program, device, or system.

account profile. Data that describes the characteristics of a user or group of users.

ACORD Corporation standard. A standard EDI format for the insurance industry.

address. (1) A unique code assigned to a user connected to a network; (2) The location in the storage of a computer where data is stored.

alias name. An alternate name used in place of an account and user ID.

alias table. An alternate name file.

alternate administrator. A substitute Information Exchange Service Administrator for an account or an individual user.

ADMD. X.400 Administration Management Domain.

Administration Management Domain (ADMD). An X.400 communications service, such as a value-added network that provides public message transfer services.

American National Standard Code for Information Interchange (ASCII). The standard code, using a coded character set consisting of 7-bit coded characters (8 bits including parity check), used for information interchange among data processing systems, data communication systems, and associated equipment. The ASCII set consists of control characters and graphic characters.

American National Standards Institute (ANSI). An organization consisting of procedures, consumers, and general interest groups, that establishes the proce-

dures by which accredited organizations create and maintain voluntary industry standards in the United States.

ANSI.   American National Standards Institute.

archive.   A place to store messages on a database for future reference.

ASCII.   American National Standard Code for Information Interchange.

asynchronous.   A process that might have to wait in a processing queue before it is completed (unlike a synchronous process, which is completed within a regular or predictable time frame).

attribute(s).   One or more variables used in X.400 and Internet user profiles to further define the profile. For example, use an attribute to specify the type of data the profile.

audit trail.   A way of tracking and verifying basic information about the status of messages.

authorization level.   The ability to do certain restricted functions.

B

baud rate.   In remote communications, the trans-mission rate that is synonymous with signal events. The baud rate is usually expressed in bits per second.

C

call out.   In events, the method of delivering the event notification to the partner application. The Call Out service type is for users who are leased line attached and support the SNA LU 6.2 protocols.

carbon copy.   An electronic copy of a message that is delivered to one or more recipients.

carbon copy partner.   The carbon copy partner can either receive the original message sent by the requester or send an original message to the requester.

carbon copy recipient.   The recipient is any user who is designated to receive the carbon copy of the original message.

carbon copy requester.   The user who defines a relationship that causes a carbon copy to be generated.

CDH.   Common data header.

cluster.   A group of user IDs consisting of a parent user ID and two or more child user IDs that serve as one user ID to a trading partner.

cluster child user ID.   In a cluster, one of the individual user ID mailboxes of a cluster parent user ID.

cluster parent user ID.   In a cluster, the generic user ID known to trading partners.

cluster mailbox.   A cluster mailbox consists of a set of user ID mailboxes that appears as one user ID mailbox to trading partners.

cluster user.   A cluster mailbox user.

command line.   The line on an Information Exchange Administration Services or interface panel where the user types commands.

command processor.   A system that processes a set of commands from a queue.

Common data header (CDH).   A set of control information about a file, which is sent to Information Exchange by some sending interfaces. When the file is received by the trading partner, the receiving interface can use the information in the CDH.

D

delivery class.   Specifies how messages and files are delivered; senders can choose from high-priority, normal-priority, and express delivery.

dial out.   In events, the method of delivering the event notification to the partner application. The Dial Out service type is for ASYNC dial users.

distribution list.   A list of the addresses of users with whom a certain user communicates. It is used to send messages to several people without having to type their addresses.

domain name.   In the Internet suite of protocols, a name of a host system. For example, *mycompany.com*.

E

EBCDIC.   Extended binary-coded decimal inter-change code. A coded character set consisting of 8-bit coded characters.

EDI.   Electronic data interchange.

EDIFACT.   An electronic data interchange standard for administration, commerce, and transport, developed by the United Nations Economic Commission for Europe.

electronic data interchange (EDI).   The process of sending specially formatted business documents directly from one computer to another electronically.

electronic mail.   The process of sending free-formatted messages and formatted files from one computer to another.

ESO.   Extended Security Option.

events.   In Information Exchange, a method of notifying a partner application upon arrival of a quali-fying message or on a specified schedule.

event trail.   The status of events that have occurred, are scheduled, or were initiated.

express-priority messages.   Messages that are delivered immediately after they are received by Information Exchange; the recipient must be receiving messages to receive an express-priority message.

extended security option (ESO).   An option that extended security users can specify in their profiles for stricter password security.

extended security users.   Users with stricter security requirements, such as levels of password protection.

G

global alias.   An alias name that can be used by any Information Exchange users.

global alias table.   (1) A system-wide alias table. (2) An alternative name table set up within a system.

Generalized Data Stream (GDS).   The GDS consists of a length (LL), which is defined as the first 2 bytes of the structured field, and a general data stream identifier (GDS ID), which is defined as the next 2 bytes following the length field that identifies the data. This figure demonstrates the GDS format.

LL	GDS ID	Data

H

high-priority message.   Messages that move to the front of the queue when they are received; normal-priority messages enter the queue in the order that they are received.

I

Information Exchange.   A commerce engine of Interchange Services for e-business that permits users to send and receive information electronically.

Information Exchange Administration Services. An online, panel-driven product that the Information Exchange Service Administrator uses to perform administrative tasks for Information Exchange.

Information Exchange Service Administrator.   The person who coordinates the use of Information Exchange in a company.

initiate an event.   A user-initiated request for a call out or a dial out to occur immediately or at a specified date and time.

Interchange Delivery Notice.   The Interchange Delivery Notice (TA3) segment is exchanged between interconnected value-added networks (VANs) to inform the sending VAN of actions taken on the inter-change receiving VAN. The TA3 reports the delivery and retrieval of the interchange. The TA3 also reports the unsuccessful delivery or retrieval of the inter-change and identifies the error condition. The TA3 includes identification data extracted from the inter-change and time stamps indicating when actions have occurred. Other optional VAN actions are also reported.

International Telecommunications Union - Telecommunications. Formerly known as the Consultive Committee for International Telegraphy and Telephone (CCITT). The international organization that develops recommendations such as X.25 and X.400.

internet. A collection of interconnected networks that uses the Internet suite of protocols. The internet that allows universal access is referred to as the Internet (with a capital "I"). An internet that provides restricted access (for example, to a particular enterprise or organization) is frequently called an intranet, whether or not it also connects to the public Internet.

Internet. The worldwide collection of interconnected networks that uses the Internet suite of protocols and permits public access.

Internet address. (1) The address assigned to each Information Exchange user in the form of a user ID, an account ID, and a domain name; for example, user1.acct1@ieusa.ihost.com. (2) The Internet trading partner's e-mail address. This address typically consists of a user name and a domain name; for example, jdoe@company.com.

Internet Protocol (IP). In the Internet suite of protocols, a connectionless protocol that routes data through a network or interconnected networks and acts as an intermediary between the higher protocol layers and the physical network.

Intersection groups. Groups whose members are authorized to communicate with each other.

IP. Internet Protocol

L

library. A place to store data for an extended period of time. A library consists of a collection of files called library members.

M

mailbox. A box that holds incoming mail; a box for electronic mail is a file where mail messages are stored until the addressee opens and reads them.

managed network. A worldwide communications network infrastructure, such as those provided by AT&T Global Network or the Advanced Network eXchange (ANX). Managed networks are also commonly referred to as value-added networks (VANs).

member. The text of a message or document that is stored in a library.

message. (1) Any piece of data that users send or receive. (2) The smallest subdivision of information that can be sent from one user to another. (3) An instruction or explanation on the screen that tells you what the system is doing or warns you that the system has detected an error.

message acknowledgment. A response from Information Exchange that lets users know whether their messages were delivered, received, purged, or various combinations of the three.

message-arrival event. In events, the arrival of a message that meets criteria defined in the message-arrival definition.

message-arrival definition. In events, criteria defined by the mailbox owner for message-arrival notification.

message class. A category used to group mail that is agreed upon by trading partners.

message group. A collection of messages that is treated as a single entity. A file of records to be printed as a single report is an example of a message group.

message header. The leading part of a message that contains information, such as the source or destination code of the message.

message key. The identifier for the message or group of messages.

message sequence. A user-defined field that can be used to help identify a message. Information Exchange does not use the information in this field.

message transfer agent (MTA). An X.400 term to describe a functional component of an X.400 messaging system. A message transfer agent (MTA) provides message transfer services by interacting with originating user agents, relaying messages to other

MTAs, and interacting with recipient user agents. MTAs relay and deliver messages in a store-and-forward fashion.

MIME. Multipurpose Internet Mail Extensions.

MTA. Message Transfer Agent.

Multipurpose Internet Mail Extensions. An Internet standard for identifying the type of object being transferred across the Internet. MIME types include several variants of audio, graphics, and video.

N

National Institute of Standards and Technology. In the United States, this was formerly the National Bureau of Standards.

NIST. National Institute of Standards and Technology.

"Non EDI data". Rules defined by the NIST to enable X.400 users to exchange binary files through the 1984 X.400 Inter Personal Messaging Service.

notify. An online service for reporting problems to the network.

O

organizational alias table. An alias table set up within an account.

Open Systems Information (OSI). A seven-layer standard for communications.

owning account. The account that owns a library.

P

password. A combination of characters users enter when they log on, designed to be secret to prevent unauthorized access of their data.

private alias table. An alias table set up for an individual user.

Private Management Domain (PRMD). A management domain made up of the X.400 messaging system(s) managed by an organization.

profile type. A category of users who have the same characteristics for using Information Exchange functions.

program function (PF) key. A key on a terminal keyboard that gives the system a signal to perform a particular command. Also called an F key.

protocol. A prearranged procedure for communication.

P2. (1) The protocol for messaging headers used for interpersonal messaging (IPM) in an X.400 message handling system. (2) An ITU-T recommendation, which describes the IPM (E-mail) message content type with the X.400 application protocol. (3) A data convention adopted by the European Trade Electronic Data Interchange System (TEDIS) program to enable X.400 users to exchange EDI data through an 1984 X.400 interpersonal messaging (IPM) service.

P35. (1) The EDI message header enhancement to X.400 that enables EDI-specific addressing, routing, and handling of EDI messaging. (2) An ITU-T recommendation, which describes the EDI Message content type with the X.400 Application Protocol, formerly known as PEDI.

R

receiver. The user or users to whose mailboxes you are sending, or retrieving information.

receive-side charges. The charges that users incur when they receive messages through Information Exchange.

receive trace. A trace of a receive issued to Information Exchange that details the parameters used in the receive command and is part of the session trail information. See **session trace**.

redirect. The diversion or redirection of a message to an alternate mailbox instead of to the original intended receiver's mailbox.

remote job entry (RJE). To submit a series of commands through a terminal or processor that has access to a computer through a data link.

RJE. Remote job entry.

S

scheduled event. In events, an event that occurs on a specified schedule.

scheduled event definition. Criteria determined by the user for a scheduled event.

send-side charges. The charges that users incur when they send messages through Information Exchange.

Session. The period of time during which a user of a terminal can communicate with an interactive system; usually, elapsed time between logon and logoff.

session trace. A trace of a session with Information Exchange that provides details such as the session start and session end response codes and information about the receive commands issued during the session.

Simple Mail Transfer Protocol (SMTP). In the Internet suite of protocols, an application protocol for transferring mail among users in the Internet environment. SMTP specifies the mail exchange sequences and message formats. It assumes that the Transmission Control Protocol (TCP) is the underlying protocol.

SMTP. Simple Mail Transfer Protocol.

synchronous. A process that is completed within a regular or predictable time frame.

T

TCP. Transmission Control Protocol

TCP/IP. Transmission Control Protocol/Internet Protocol.

TDCC. Transportation Data Coordinating Committee.

TEDIS. Trade Electronic Data Interchange Systems.

Trade Electronic Data Interchange Systems. A European Commission Programme that has the mission of speeding the acceptance of EDI in Europe.

Trading Partner. The business associates with whom users exchange information electronically.

trading partner list. A list of business associates that users can send information to and receive information from using Information Exchange.

trading partner profile. A list that defines which trading partner pays to send or receive messages.

Transmission Control Protocol (TCP). A communications protocol used in the Internet and in any network that follows the Internet Engineering Task Force (IETF) standards for internetwork protocol. TCP provides a reliable host-to-host protocol between hosts in packet-switched communications networks and in interconnected systems of such networks. It uses the Internet Protocol (IP) as the underlying protocol.

Transmission Control Protocol/Internet Protocol (TCP/IP). (1) The Transmission Control Protocol and the Internet Protocol, which together provide reliable end-to-end connections between applications over interconnected networks of different types. (2) The suite of transport and application protocols that runs over the Internet Protocol.

Transportation Data Coordinating Committee (TDCC). A standard EDI format used in the transportation industry.

U

UA. User agent.

user agent. A user ID or application program that acts on behalf of another user to enable X.400 communications. User agents submit and receive messages to and from a message transfer agent.

UCS. Uniform Communication Standard.

Uniform Communication Standard (UCS). A standard EDI format used in the grocery industry.

United Nations/Trade Data Interchange (UN/TDI). An EDI standard for administration, commerce, and transportation fields developed by the United Nations Economic Commission for Europe.

UN/TDI. United Nations/Trade Data Interchange.

user group. A set of users within an account who can communicate with one another.

user ID. A name that identifies a user to Information Exchange within an account.

user-initiated event.   A call out or a dial out initiated by the user to occur immediately or at a specified date and time. The event occurs only once.

user message class.   A category used to group mail. This category is agreed upon by trading partners.

user name.   A name (generally user-defined) that identifies a user to the Internet domain of a network or online service.

user profile.   The characteristics that designate how a user works with Information Exchange.

W

wildcard.   A special character, such as a question mark, that can be used to represent one or more characters.

X

X12.   An electronic data interchange standard that defines a specially-formatted EDI data stream, approved by the American National Standards Institute (ANSI).

X.400.   (1) A suite of OSI communications standards, defining services and protocols for computer-based messaging. (2) The ITU-T recommendation that defines a standard for international message handling.

X.435.   (1) A suite of OSI communications standards, defining services and protocols for EDI messaging. (2) The ITU-T recommendation for interchange of messages between EDI messaging systems.

Index

A