

Compliance Link

Vendor Quick Start

This guide assists vendors using Compliance Link in the Actionable Intelligence (AI) computer software application. This guide is organized as follows:

- “Logging Into AI” on page 1
- “Tips for Using AI” on page 3
- “Viewing and Completing Your Tasks” on page 4
- “Using the Message Error Highlighter Page” on page 12

Logging Into AI

Important: To log into AI, your browser must be Internet Explorer (IE) 6.0 or 7.0. You can also use IE 8, but only with the compatible view option active. You can probably open AI in the Firefox browser, but parts of the user interface may not display, so we recommend using IE.

Use the first procedure below to log in the first time. To log into AI after the first time, use the second procedure below.

Note: To log into AI for the first time, you must be able to find and open emails that you will receive from Inovis, a GXS Company. Therefore, add no-reply@inovis.com and compliancelink@inovis.com to your email program’s list of safe senders. Otherwise, the email will go to your junk mail folder.

To log in for the first time

- 1 Open the New User Notification email you received after an administrator created your user account in AI.
- 2 Copy and write down your User ID, which is contained in the email, because you’ll need it soon. The User ID is case-sensitive.
- 3 Click the **Click here to activate your user account** link in the email.

The AI website opens. The New User Activation (Step 1 of 3) box displays.

Note: To easily find the website on future visits, bookmark it.



- 4 Type your User ID and the email address the administrator used to create your AI user account, then click **Continue**.

The New User Activation (Step 2 of 3) page displays. Leave it open while you wait for an email from Inovis that contains a Security Key.

- 5 When the email arrives, copy the Security Key in the email.
- 6 In AI, type your User ID and paste the Security Key that you copied from the email, then click **Continue**.
- 7 The New User Activation (Step 3 of 3) page displays.

- 8 Type your User ID and the password you wish to use to log into AI. In the Confirm Password field, type the password again exactly as you did before, then click **Continue**.

Important: Remember that passwords and User IDs are case-sensitive.

The Time Zone Settings page displays.

- 9 In the drop-down menu, select the time zone you wish AI to use to display timestamps, then click **OK**. This is usually the time zone that you work in.

The Actionable Intelligence user interface opens.

Important: Bookmark this page for easy reference in the future. This is where you will log in when you use AI in the future. See “To log in after the first time” on page 3.

If you wish to start working in AI, see “Viewing and Completing Your Tasks” on page 4.

To log in after the first time

- 1 Go to the AI website URL for your portal. You may have bookmarked this page at the end of “To log in for the first time” on page 1.
- 2 Type your case-sensitive User ID and Password, then click **Login**.

Note: If you forget your password, click the **Forgot your password?** link to receive a new password. Your system administrator cannot see your password.

One of the following will occur:

- If the portal and organization combination for the website URL has only one project, AI will automatically select that project and display the Dashboard. Begin working in AI. Do not go to the next step.
- If the portal and organization combination for the website URL has two or more projects, the Select Project dialog displays, as shown below. Go to the next step.



- 3 In the Select Project dialog, click **Choose**.
A list of projects for your portal and organization displays in the Projects list dialog.
- 4 In the Projects list dialog, select the name of the retailer or flowpath project you want to work in. An email you received earlier should contain this information.
- 5 At the bottom of the Projects list dialog, click **OK**.
The Projects list dialog closes, and the selected project name displays in the Project field in the Select Project dialog.
- 6 In the Select Project dialog, click **OK**.
The Actionable Intelligence user interface opens. If you wish to start working in AI, see “Viewing and Completing Your Tasks” on page 4.

Tips for Using AI

The following tips may improve your AI experience:

- Do not click the browser **Back** button. You will exit the AI application.
- Open only one AI application window.
- If you make changes on screen and your change or data does not display, click **Refresh** in AI (not in the Internet Explorer toolbar). If this does not solve the problem, log out and log back in.
- When the spinning wheel icon displays, the page is loading. Some pages can take time to load, depending on the task and your Internet connection speed. Inovis recommends a broadband Internet connection for best performance.
- If a page displays a red “Important Message” error message, do the following:

- a Note the time the error occurred, and take a screen shot of the AI screen that you're on. (The time displays in the lower right corner of your monitor display.)
- b Try to remember the actions you took before the exception occurred (for example, the icon you clicked and the page you were on).
- c Email the information to Compliance Services at ComplianceLink2@inovis.com.

Note: After an exception occurs, log out, then log back in. This will probably improve performance.

Viewing and Completing Your Tasks

Use the following procedure to view and complete the tasks necessary to begin exchanging business documents with your retailer.

The sections that follow describe how to work with tasks assigned to you in AI.

After you log in, as described in "Logging Into AI" on page 1, the Dashboard displays, as shown below. It includes three boxes: Messages, Tasks, and Announcements.

Click the **Dashboard > <Project Name>** tab to reopen this page.

Click to show or hide navigation panel at left.

The Tasks box displays the number of tasks you have and their current status. To view tasks, click a **View** button.

The Announcements box displays announcements, including links to useful procedures. To view a procedure, click a **View** button in the Messages box.

The Project Library displays just below the three Dashboard boxes. To view a project document, click its link in the Project Library.

Click an enabled **View** button in the Tasks box to open a list of that category of tasks.

Messages			Tasks			Announcements
New "Important"	0	View	Overdue	0	View	There are no announcements!
New "Normal"	0	View	Not Started	3	View	
Total	0	View	In Progress	0	View	

The first time you log in, there will probably be tasks and announcements in those boxes. The announcements are a handful of procedures to use to complete tasks in AI.

Below the boxes will be a Project Library, which includes links to project documents, such as specifications, test data, guidelines, and so on. To view a document, click its link in the Project Library.

After logging into AI as described in "Logging Into AI" on page 1, use the following sections as a guide to work on your onboarding tasks:

- "Beginning Your Tasks" on page 5
- "Onboarding Phases" on page 6
- "Completing Tasks in the Information Phase" on page 6

- “Completing the Pricing Task” on page 7
- “Completing the Testing Tasks” on page 8
- “Completing the Completion and Setup Tasks” on page 11

Most of these sections contain a procedure that describes how to complete the tasks in that phase of the onboarding process. See also “Onboarding Phases” on page 6.

Beginning Your Tasks

Use the following procedure to begin working on your tasks at any session in AI, not only the first time you begin working on tasks.

To begin working on tasks

- 1 On the Dashboard in AI, in the Tasks box, click the **View** button for tasks with Not Started or Overdue status. The status of the tasks you need to work on depends on whether they have passed their due date.

The Onboarding Tasks list displays, as shown below. It displays the first few tasks. For an explanation of numbering in task names, see “Onboarding Phases” on page 6.

Note: As you complete tasks, they are marked with green check mark on the Onboarding Tasks list.

Select **Not Started**, **Overdue**, or **In Progress** in the Status menu, then click **Apply** to display only tasks with that status.

Click the **Name** column header to sort the list in order.

Task names include the onboarding phase number and task number.

Name	Project	Assigned To	Status
1.2 Download EDI Guidelines	Netshops	Jim Ruth	Not Started
1.1 General Instructions	Netshops	Jim Ruth	Not Started
1.3 Trading Partner Profile	Netshops	Jim Ruth	Not Started

Click **Apply** to reset the tasks list after changing the Status setting.

Note: You can also open this page by clicking **Community Management**, then **Onboarding Tasks** in the navigation panel on the left side of the page.

- 2 In the Status drop-down menu, select **Not Started**, **Overdue**, or **In Progress**, then click the **Apply** button to display only tasks with that status.

The tasks list resets to show all tasks with Not Started, In Progress, or Overdue status.

Note: If you think a task might be missing, click the **Refresh** button in the AI toolbar (not in the browser toolbar) to refresh the task list. If no tasks display, check to make sure you are in the correct project. If the problem persists, contact Compliance Services.

- 3 Click the **Name** column header to sort the list of tasks in the correct order.
- 4 Click the first task in the list (the row turns yellow), then click **Open** in the AI toolbar.

Note: You can work on tasks in the current list in any order you wish. You may find the task numbering out of order—for example, 1.1 following 1.2 rather than preceding it. To list the tasks in the correct order, click the Name column header.

Complete the onboarding phases and their tasks as described in the sections below.

Onboarding Phases

The onboarding process is a series of phases, each containing several tasks:

- 1 Information
- 2 Pricing
- 3 Testing
- 4 Completion and Setup

Onboarding consists of a series of phases you must complete, and each phase includes one or more tasks. In the task names in the first column, the first digit indicates the phase number; the second digit indicates the task number in that phase. For example, 1.2 Download EDI Guidelines means that Downloading EDI Guidelines is the second task in the first phase.

Completing Tasks in the Information Phase

Use this procedure to complete tasks in the information phase.

To complete the information tasks

- 1 After logging into AI, begin your work session as described in “Beginning Your Tasks” on page 5.
- 2 Click the row of the first task, 1.1 General Instructions, to select it, then click **Open**.
The General Instructions document opens in a new page.
- 3 Read the instructions on the page.
- 4 Do one of the following using either the buttons at the bottom or the Save and Close options in the toolbar at the top:
 - Click **Save & Open Next Task** to save and open the next task—in this case, 1.2 Download EDI Guidelines. (In the toolbar, click **Save** to show the save options.)

Note: The next task opens only if it is assigned to you. If the next task belongs to a different user, then the task list opens with a notice that no associated tasks were found.
 - Click **Save & Close Task** to save and return to the task list.
 - Click **Close** to cancel.

One of the following occurs:

- If you took action, the status for the task updates to Completed.
 - If you closed without taking action and you are the task owner, the status for the task updates from Not Started to In Progress.
 - If you closed without taking action and you are not the task owner, the status for the task is not updated.
- 5 If you did not open the next task, 1.2 Download EDI Guidelines, when you saved the previous task, on the task list click the row for task 1.2, then click **Open**.
The 1.2 task page displays a list of files to download.
 - 6 Download all files.

Note: If you need to download the files again later after task is gone from your tasks list, you can download them from the Project library on the Dashboard.
 - 7 Do one of the following:

- To mark the task complete and return to the task list:
 - In the toolbar click **Done > Done & Close Task**, or
 - At the bottom of the page, click **Done & Close Task**.
- To mark the task complete and go to the next task:
 - In the toolbar click **Done > Done & Open Next Task**, or
 - At the bottom of the page, click **Done & Open Next Task**.
- To cancel instead of marking the task complete, click **Close**.

One of the following occurs:

- If you took action, the status for the task updates to Completed.
 - If you closed without taking action and you are the task owner, the status for the task updates from Not Started to In Progress.
 - If you closed without taking action and you are not the task owner, the status for the task is not updated.
- 8** If you did not open the next task, 1.3 Filling Out a Trading Partner Profile, when you marked the previous task Done, on the task list click the row for task 1.3, then click **Open**.

A new page displays a Trading Partner Profile form to fill in.

- 9** Fill in the form. All fields with an asterisk (*) next to the name are required.

Note: The form varies among retailers, and some retailers do not use this form at all.

Important: Do NOT select the check box (“I have already certified with...”) unless your company has already completed certification under a different company or division name. You do not have to certify again for each division of your company. Third parties should NOT select this check box.

CL_Trading_Partner_Profile

Trading Partner Status - Check any that apply.

Only check this box if your Company has another division (not 3rd party), that has previously tested and certified ur

I have already completed testing with _____ under a different company name.

Vendor Name: *

Vendor Number: *

- 10** Save and/or close the task as described in step 4.

Continue with “Completing the Pricing Task” on page 7.

Completing the Pricing Task

Use this procedure to complete the pricing task.

To complete the pricing task

- 1 After logging into AI, begin your work session as described in “Beginning Your Tasks” on page 5.
- 2 If you did not open the next task, 2.1 Pricing Agreement, when you saved the previous tasks, on the task list click the row for task 2.1, then click **Open**.
A new page opens.
- 3 Verify the EDI information listed. If necessary, fill in other information. Make sure you select the option to agree to the pricing contract.
- 4 Save and/or close the task as described in step 4 in “Completing Tasks in the Information Phase”.

You will receive a confirmation email soon of your agreement to the pricing contract.

Continue with “Completing the Testing Tasks” on page 8.

Completing the Testing Tasks

Use this procedure to complete the testing tasks.

To complete the testing tasks

- 1 After logging into AI, begin your work session as described in “Beginning Your Tasks” on page 5.
- 2 If you did not open the next task, 3.1 Choose Type of 850 Test File, when you saved the previous task, on the task list click the row for task 3.1, then click **Open**.

A new page displays.

Note: The form varies among retailers, and some retailers do not use this form at all.

- 3 Confirm that you have all of the product data types in the list—for example, Price, UPC Code, and so on—then do one of the following at the bottom of the page:

- If you do not have all the information listed, select **No, thanks, I'll use the generic test file....**

If you cannot process the Compliance Link generic 850, you must select the Yes option below.

- If you do have all of the information listed, select **Yes, I'll configure a custom test file.**
- 4 Save and/or close task 3.1 as described in step 4 in “Completing Tasks in the Information Phase”.

The next task, 3.2, is either Download Generic 850 or Download 850 (that is, download the process to create a custom 850), depending on your selection in task 3.1

- 5 If you did not open task 3.2 when you saved the previous task, on the task list click the row for task 3.2, then click **Open**.

A new page opens. Do one of the following:

- If you selected No (use generic test file) above, a page displays on which you can download the generic 850 test file. Do so, then go to step 13.
- If you selected Yes (configure a custom test file), go to the next step.

- 6 If you selected Yes (configure a custom test file), click **New Test**.

A new page opens.

- 7 Click **Start Test**.

A message informs you that you have five minutes to complete this task, or you must start the task over.

- 8 Click **OK** in the message box.

- 9 After the page resets, click **Configure**.

A new page displays a form to fill in.

- 10 For each field in the form, read the instructions next to the field and type the requested information.

Note: You can change anything already filled in. If you do not know some information requested, leave the information already entered in the field.

- 11 Click **Save**.

A page displays with a Wait icon flashing. Wait for AI to generate the 850 test file. After AI generates the file successfully, the page will look like the one below.

Process Test > Download 850

Close New Test Refresh

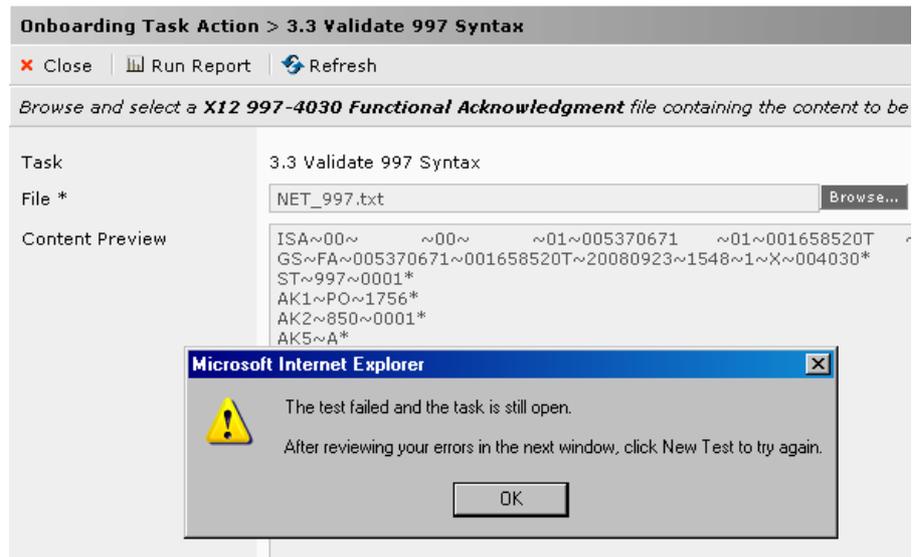
Process: Order to Cash Started: 2009-04-22 13:37:21
 Test Case: Download 850 Ended: 2009-04-22 13:41:20
 Partner: jim has new shoes Status: Complete
 User: jim ruth

Click **Show Document Results** to view the document result details for received documents.

Test Steps		
Step	Instructions: You should have recent production data from a QA Netshops Purchase Order before you begin this task. You will need to save the 850 that is generated for use in later tasks. You will need to prepare any related business documents (810, 856) to match the data you load in this 850. <ul style="list-style-type: none"> Click configure to begin the process to create the QA Netshops Standard 850. Once you have completed filling out the template and the task is successfully completed click download to retrieve the 850. Click Show Document Results to view the PO (Generate Document)	Download
Status	Passed Document Available for Download, 2009-04-22 13:41:16	
Step	Click Show Document Results to view the PO. (Inbound Document)	Show Document Re
Status	Passed Received from Internal-QANetshops Without Errors, 2009-04-22 13:41:19	
Document Exceptions	0	

- 12** Click **Download** on the right side of the page.
AI downloads the 850 test text file to where you specified or where files automatically save when downloaded.
- 13** Click **Close**.
The tasks list page displays.
- 14** Leave AI open while you run the 850 test file through your translator. When processing finishes, export as text files any response documents—for example, an 856 or 810—that you will need to test later. (Document types that require testing will be listed in your phase 3 tasks.)
Note: If you cannot import 850/860 documents and export the turnaround documents, see the Test Files via VAN process document in the Project Library. Compliance Services can send you files over the VAN.
- 15** If you did not open task 3.3 Validate 997, when you saved the previous task, on the task list click the row for task 3.3, then click **Open**.
A new page opens.
- 16** Click **Browse**, then browse to the location of the 997 test file and select that file.
- 17** Click **Run Report**.
- 18** Do one of the following:
 - If the test passes, click **OK** in the message box that displays the success message, then click **Close** to close the task window. Skip the next step.

- If the test fails, click **OK** in the message box, as shown in the screen shot below.



The Message Error Highlighter displays the 977 document with error information. For assistance, see “Using the Message Error Highlighter Page” on page 12.

- 19 If the test failed, correct the errors, then test the file again.
- 20 For all other document types listed in phase 3, such as 856, 810, and so on, open tasks from the tasks list page or by clicking Save & Open Next Task on the previous task, then use the Run Report test described above.

Important: After all documents types listed in phase 3 test successfully, Compliance Link runs more tests on those documents during the next 24 hours (business days). If all test documents pass Compliance Link testing, task 4.1 will display in your tasks list. If any documents fail Compliance Link testing, you will receive an email informing you of that fact, and tasks will reappear in your tasks list for phase 3. You must fix and retest those documents as described above.

After your documents pass testing, continue with “Completing the Completion and Setup Tasks” on page 11.

Completing the Completion and Setup Tasks

Use this procedure to complete the completion and setup tasks.

To complete the completion and setup tasks

- 1 After logging into AI, begin your work session as described in “Beginning Your Tasks” on page 5.
- 2 Click the row for task 4.1 Complete Pass Notice, then click **Open**.
The Pass Notice form for retailers opens in the Task Action page.
- 3 Fill in all of the fields.

Important: Be accurate with all of this data. If any of this data is incorrect, you might not be able to receive documents from your retailer.
- 4 Save and/or close task 4.1 as described in step 4 in “Completing Tasks in the Information Phase”.

You will receive a confirmation email very shortly that the information is received.

Later you will receive another email requesting that you complete a brief survey.

- 5 After receiving the request to complete a survey, log into AI, open the tasks list page, click task row 5.1 Customer Satisfaction Survey to select that row, then click **Open**.

The survey form opens.

- 6 Complete it, then save and/or close task 5.1 as described in step 4 in “Completing Tasks in the Information Phase”.

You have completed the onboarding process.

Using the Message Error Highlighter Page

The Message Error Highlighter page helps you isolate the location of errors in a document. The page uses a red color to highlight the elements that contain errors. The page also provides several views of a document to help you resolve errors.

Click **Document Views** to change the way the document displays on the page (see “Document Views Tab” on page 13).

Click **Download** to download the message or document to your computer.

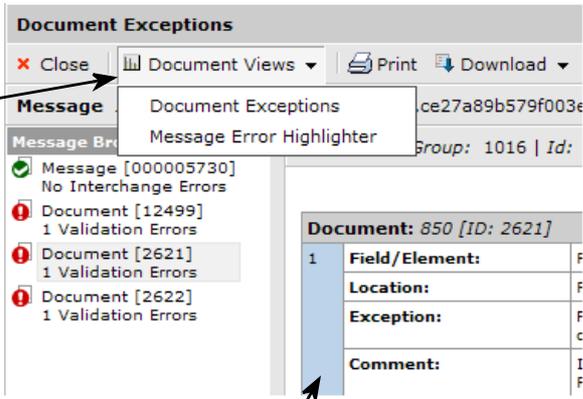
The screenshot shows the Message Error Highlighter interface. At the top, there are buttons for 'Close', 'Document Views', 'New Test', and 'Download'. Below this is a header for the message: 'Message ID: 000000270 | File: ABCD810.txt | Received: 2008-02-15 16:53:12 | Sender: Demo 2.0 | Receiver: Demo 2.0'. The main area is divided into a 'Message Browser' on the left and a 'Document' view on the right. The Message Browser lists 'Message [000000270]' with '1 Parsing Errors' and 'Document [002420001]' with '6 Parsing Errors' and '34 Validation Errors'. The Document view shows a list of EDI segments, with several fields highlighted in red to indicate errors. On the right side of the document view, there is a list of error messages, each with a '+' icon to expand and a '-' icon to collapse. Annotations with arrows point to these elements: 'Click Document Views to change the way the document displays on the page (see “Document Views Tab” on page 13).', 'Click Download to download the message or document to your computer.', 'The Message Browser lists the message and documents within it that contain errors.', 'This document has a parsing error and a validation error.', 'Click a red highlighted area to see details and comments associated with the error at the location in the document.', and 'Total number of parsing and document validation errors in the document. Click + to expand information, - to collapse it.'

Document Views Tab

The Document Views tab lets you select from different graphic representations of the document. This provides an easy way to read data, validate its accuracy, and resolve errors.

Select a view to see a different graphic representation of a business document.

Note: The selections in the list are unique to your company.



The screenshot shows the 'Document Exceptions' window. At the top, there is a 'Document Views' dropdown menu with options for 'Document Exceptions' and 'Message Error Highlighter'. Below this is a list of messages. The first message is 'Message [000005730] No Interchange Errors'. The next three are 'Document [12499] 1 Validation Errors', 'Document [2621] 1 Validation Errors', and 'Document [2622] 1 Validation Errors'. A detailed view for 'Document: 850 [ID: 2621]' is shown on the right, containing a table with the following data:

Document: 850 [ID: 2621]	
1	Field/Element:
	Location:
	Exception:
	Comment:

The Document Exceptions View, shown in the graphic, provides specific information about the error.

