

IBM Sterling Gentran:Server for Windows



# Forms Integration Tutorial for Print Forms

*Version 5.3.1*



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**Note**

Before using this information and the product it supports, read the information in "Notices" on page 147.

This edition applies to the 5.3.1 version of IBM Sterling Gentrans:Server for Microsoft Windows and to all subsequent releases and modifications until otherwise indicated in new editions.

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# Chapter 1. Getting Started

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## About this Tutorial

This tutorial for the Sterling Gentran:Server® Forms Integration subsystem references the ANSI X12, EDIFACT, and TRADACOMS standards. Any sections in this tutorial that do not apply to all three standards are marked with the applicable standard name. If a section heading does not include a standard name, then the section applies to all three standards. In some tasks, the steps and information apply to all three standards but a specific detail may be different, such as a field name. For example:

In the "What is the name of the form" box, enter one of the following:

- **Print 850 Pet Zone** (for ANSI X12)
- **Print ORDERS Pet Zone** (for EDIFACT)
- **Print TRADACOMS ORDERS Pet Zone** (for TRADACOMS)

This tutorial includes a print example (purchase order) and a screen entry example (invoice). This tutorial defines the tasks necessary to create forms and describes how to customize and format a form before it is compiled into a translation object. A print form enables you to print customized EDI data that has been processed through the translation object. A screen entry form is a predesigned layout that, when compiled into a translation object, enables users in your company to enter the data necessary to create a business document.

The form that you create is a source form. When that source form is compiled, the result is a compiled translation object. You must register the translation object with Sterling Gentran:Server to be able to use the translation object to enter EDI data in messages of that type.

To access reference information, refer to the *IBM® Sterling Gentran:Server for Microsoft Windows Forms Integration User Guide*. For additional information on the various tasks described in this guide, refer to the *IBM Sterling Gentran:Server for Microsoft Windows User Guide*.

This guide assumes that you are familiar with using a PC and with Microsoft Windows functions, including:

- The terminology used to describe mouse and cursor actions.
- The terminology used to describe Windows-specific attributes, including dialog boxes, icons, windows, and buttons.
- Using the Windows Program Manager.

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## The Forms Integration Subsystem

A form is a set of instructions you define in the Forms Integration subsystem that indicates how the system should format data. When you compile the form, Sterling Gentran:Server generates a translation object. After you register the translation object with Sterling Gentran:Server and associate the translation object with a partner relationship, the system uses the translation object to format EDI documents. The Forms Integration subsystem enables you to create print and screen entry translation objects.

Regardless of whether the translation object is print or screen entry, Sterling Gentran:Server generates the actual format of the translation object based on the EDI file format (in the EDI File Format Pane) and displays it in the Layout Pane.

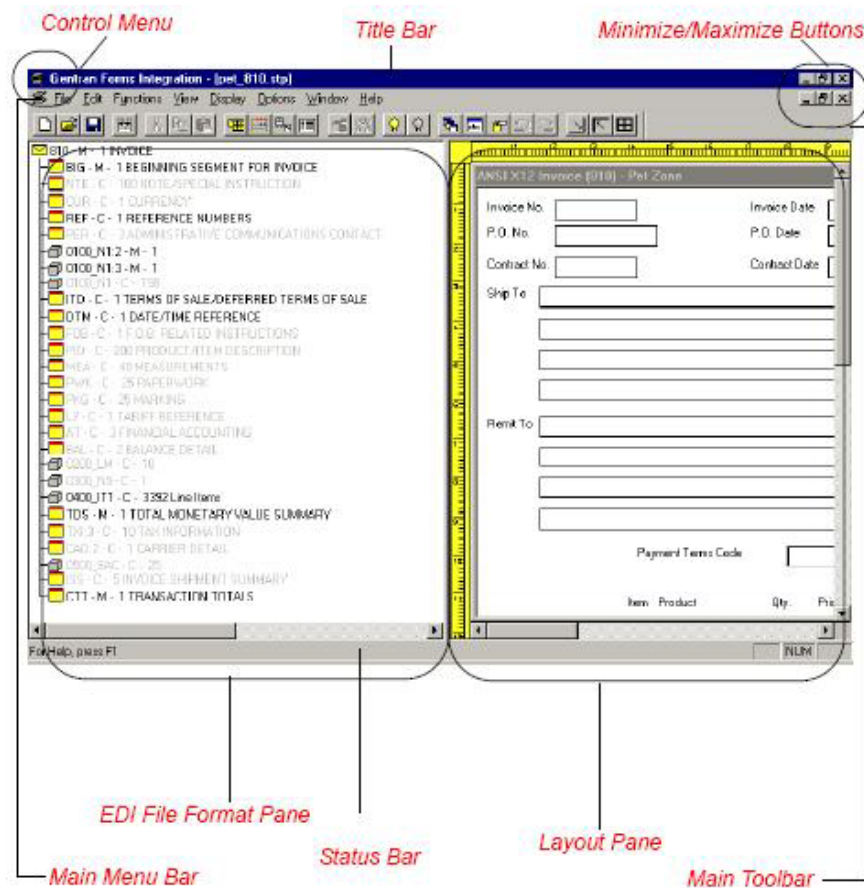
A print translation object organizes and formats the printout of EDI documents that are received from or sent to the trading partners for which you have established a trading relationship that uses that print translation objects. The print translation object enables you to view the EDI document in an easy-to-read format.

A screen entry translation object provides a standardized format for entering an EDI document into the Document Editor for translation and transmission to your trading partners. The screen entry translation object ensures that your users enter all the data necessary to create the required EDI document.

Sterling Gentran:Server generates the translation object format based on the EDI file format in the EDI File Format Pane and displays that format in the Layout Pane.

## Forms Integration Window

The following diagram illustrates the Forms Integration Window. (This is an ANSI X12 example.)

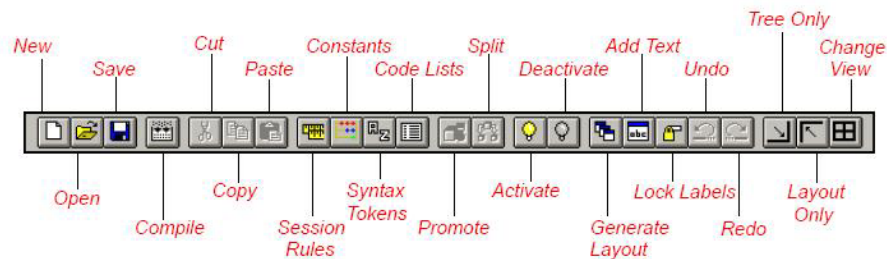


This table describes the Forms Integration window components.

Part	Function
Main Menu Bar	Contains drop-down menus. Unavailable items are dimmed.

Part	Function
Main Toolbar	Enables you access to some of the most common operations in the Application Integration subsystem. Unavailable items are dimmed. The Main Toolbar is a dockable toolbar, so you can affix it to any edge of the client window.
EDI File Format Pane	Cntains the EDI file format. When you click a segment or group in the EDI file format, the corresponding frame is displayed in the Layout Pane. When you click an element in the EDI file format, the corresponding layout component is highlighted in the Layout Pane.
Layout Pane	Contains the format of the translation object. Each group (with a maximum usage greater than one) and repeating segment has a corresponding frame in the Layout Pane. When you click a segment or group in the EDI file format, the corresponding frame is displayed in the Layout Pane. When you click an element in the EDI file format, the corresponding layout component is highlighted in the Layout Pane.
Status Bar	Displays status information about a selection, command, or process, defines menu items as you highlight each item in the menu, and indicates any current keyboard-initiated modes for typing (e.g., CAP for the "Caps Lock" key, NUM for the "Num Lock" key, etc.).

The Main Toolbar gives you access to some of the most common operations in Sterling Gentran:Server. Unavailable items are dimmed. The Main Toolbar is a dockable toolbar, so you can affix it to any edge of the client window. This diagram illustrates the Main Toolbar.



## EDI File Format Pane

The EDI File Format Pane (left side of the Forms Integration subsystem main window) contains the EDI file format. The EDI file must contain all the information that you need to include to either create a document using the Document Editor (screen entry translation object) or print documents (print translation object), so that your system can accurately process the data.

### Generating EDI files

Sterling Gentran:Server generates an EDI file for you, based on the standard (agency), version, transaction set, and release (for the TRADACOMS standard only) you selected. The system includes all the groups, segments, composites, and elements that are defined by the standards agency for the version of the document you selected.

You typically need to customize the system-generated EDI file by modifying the properties of the form components, and using specialized Sterling Gentran:Server functions to manipulate the EDI file structure.

## Generating specialized EDI standard versions





If you want to use a specialized version of an EDI standard that is not available in the IBM Sterling Gentran® Standards Database for EDI, it may be appropriate for you to define the EDI file yourself.

Regardless of whether the system generates the EDI file or you define it, the specific EDI form components that you use depend on the type of form you are creating. This includes the standard, version, and transaction set (document) selected, and which groups, segments, composites, and elements your company requires.

We recommend that you determine which form components you are using before generating or defining an EDI file.

### Form components

This table describes form components that Sterling Gentran:Server uses to define the EDI file format.

Icon	Description
Group 	A group is a looping structure that contains related segments and/or groups that repeat in sequence until either the group data ends or the maximum number of times that the loop is allowed to repeat is exhausted. Groups are defined by the EDI standards. A group that is subordinate to another group is a subgroup (this corresponds to a nested looping structure – a loop within a loop). The EDI file is a group and therefore, it is visually represented the same way as other groups and subgroups in Sterling Gentran:Server.
Segment 	A segment contains a group of related elements or composite data elements that combine to communicate useful data. Segments are defined by the EDI standards. A segment can occur once or can repeat multiple times.  Maximum use: Refers to the number of times that a segment can be used within the structure in which the segment is defined. For example, if a segment can be used only once within a group, but the group can be used multiple times, the segment still has a maximum use of one within each occurrence of the group. The standard defines the maximum number of times a segment can be used, but you must determine how many times a segment is used, based on what you are sending your trading partner.
Composite 	A composite is a data element that contains two or more component data elements or subelements. Composites are defined by the EDI standards that use them (EDIFACT, TRADACOMS, and certain ANSI X12 standards).
Element 	An element is the smallest piece of information defined by the EDI standards. <ul style="list-style-type: none"><li>• When an element has an operation performed against it, a red checkmark is displayed over the element icon.</li><li>• When an element contains a standard or extended rule, a black asterisk appears to the right of the element icon.</li></ul>

---

## Layout Pane

The Layout Pane (right side of the Forms Integration subsystem main window) contains the actual format of the translation object. Sterling Gentran:Server uses frames to format the EDI file for the translation object. Each frame contains the groups, repeating segments, and elements at that level (single segments are not represented on the frame).

For screen entry translation objects, groups (with a maximum usage greater than one) and repeating segments are formatted as lists. Elements are formatted as edit boxes (fields) or drop-down lists on the frame. Elements are typically formatted as fields, but are formatted as a drop-down list if you apply a standard rule that allows a selection of multiple items. Each group and repeating segment also has a corresponding frame that contains all the groups (with a maximum usage greater than one), repeating segments, and elements at that level.

For print translation objects, groups, repeating segments, and elements are always formatted as fields.

Each group and repeating segment also has a corresponding frame that contains all the groups (with a maximum usage greater than one), repeating segments, and elements at that level.

When you click a segment or group in the EDI File Format Pane, the corresponding frame is displayed in the Layout Pane. When you click an element in the EDI File Format Pane, the corresponding layout component is highlighted in the Layout Pane.

---

## About Forms

Sterling Gentran:Server generates a basic form based on the following information:

- Type of form (such as print or screen entry)
- Standard agency (such as ANSI X12, EDIFACT)
- Standard version (such as 003040, 90.1)
- Document/message type (such as 810 INVOICE, INVOIC)
- Release or message version (such as 9 for TRADACOMS)

All mandatory groups, segments, composites, and elements for the standard, version, and transaction set/message you specify are available for use (activated) when Sterling Gentran:Server creates a form. Only these mandatory form components (groups, segments, composites, and elements) are activated automatically. You must activate additional form components that you want to be displayed in the screen entry form, and then customize and format the form so that it is appropriate and useful for your company's needs.

Before you begin to customize a form, you should be familiar with the following elements of form design:

- EDI standards (how EDI standards work and how the information that your users need is translated to and from the standards)
- Your users (the individuals who are using the forms to either create printouts of processed EDI data or enter EDI data on a screen)
- Your trading partners (the organizations exchanging the EDI documents with your company)

You can create a different form for each combination of transaction set/message, trading partner, and standard version. The number of screen entry forms that you create is not limited and does not affect the number of print forms you can create, and vice versa.

We recommend that you mock up a layout of the form the way you ultimately want it to look. As you design the layout, make sure that the form will make sense to the people who will use it. By analyzing your company's needs before you actually create the form, you reduce the amount of time spent later on redesigning or reformatting the form.

You should include the following design considerations in your form planning:

- Which fields should be printed, and which are necessary for the EDI data but do not need to be displayed on the printout
- Where fields should be located on the form
- What labels you are using to identify the fields on the form

---

## Building a Form with Forms Integration

This table describes the steps required to build a form using Forms Integration.

Stage	Description
1	Prepare and Analyze. Obtain a layout of how you want the form to be displayed and determine how it corresponds to the EDI standard you are using. Determine what operations need to be performed to generate the required layout.
2	Set Global Defaults (first time only). The first time you use the Sterling Gentran:Server Forms Integration subsystem, you should verify the default date format that the system uses.
3	Create, Save, and Name a New Form.
4	Activate the Appropriate EDI Groups, Segments, and Elements.
5	Promote, Split, and Change Segments and Groups.
6	Customize the EDI Data.
7	Define the Layout of the Form.
8	Compile the Form.
9	Print the Report. Validate and review the form, and make modifications as needed.
10	Test the Translation Object. For a screen entry translation object, create a new document in Document Editor, using that translation object. For a print translation object, print a document. Verify that the output is correct.

---

## Getting Started

This tutorial is meant to be completed in its entirety. We recommend that you complete each task sequentially. When you create your own forms, the phases may overlap and you may have to return to one or more of the phases several times before the form is completed. The purpose of completing each task in this tutorial in sequential order is not only to teach you how to perform the individual tasks, but also to teach you a logical approach and methods that should be used when you create your own form.

In these tutorials, you create a screen entry form for an invoice and a print form for purchase order. In both of these tutorials, you will be using one of the following standards:

- ANSI X12 003040
- EDIFACT 92.1
- TRADACOMS ANA001 release 9

The default folder is GENSRVNT\Forms. The tutorial data is in the C:\GENSRVNT\TUTORIALS subfolder.

The steps involved in creating forms are broken down into manageable pieces so that you can learn the tasks and procedures involved in creating a form. Then, you can apply the knowledge gained from using this tutorial to create your own forms.

In this scenario, your company is MWT Manufacturing Co., which manufactures a wide variety of pet supplies for pet stores. One of your trading partners, Pet Zone (a large pet supply retailer), orders products from your company. Your company then invoices Pet Zone for those products.

You will create a form that formats and arranges the EDI data you receive from Pet Zone to produce a printout of a purchase order.. You do not want to alter the integrity of the EDI data. However, you want to interpret some of the codes included in the EDI message into more meaningful text.

Then, you will create a form that your data entry users will use to enter EDI data for the invoice that you will send to Pet Zone. From discussions with Pet Zone, you know the requirements for the invoices that they receive from you.

---

## Analyze the EDI File

You and your partner must agree on which standard, version, and message/transaction set you are using. It is helpful to review the EDI standard that you are using before analyzing the EDI file. We recommend that you obtain an EDI standard manual for the standard and version that you are using. Standard manuals are available from EDI standard agencies.

For purchase orders, you must first determine what data your trading partner will be sending you and what data is contained in each element. Discuss with your partner what they will send and which segments and elements your company requires. You can then make a list of the items that you will need to use. You will then make the form components you need available for use

For invoices, you must determine what data you need to send your trading partner and what data your trading partner expects to receive and what data is contained in each element. It is important to analyze the data in this way so that the invoice contains all the necessary information, and so that your company can bill your partner correctly for the order you shipped to them. Discuss with your partner what you are sending and which segments and elements your partner requires. You can then make a list of the items that you will need to use.

Sterling Gentran:Server generates a form based on the groups, segments, composites, and elements that are defined by the standard agency for the version of the document you selected. The system activates all the groups, segments,

composites, and elements that are defined as mandatory by the standard. The system does not enable you to deactivate mandatory groups, segments, composites, and elements.

**Note:** The TRADACOMS standard uses a header with each interchange (ORDHDR for the ORDERS message). The header message contains information that pertains to each message in the interchange. Sterling Gentran:Server copies the header segments to the beginning of each document, to ensure that all the relevant information is contained in the document. Therefore, you will need to load the header message (ORDHDR) into the ORDERS EDI file, so that all the segments and elements are available for use.

When translating data, the system does not process groups, segments, and elements that are not activated. Therefore, you must activate the groups, segments, and elements that are not defined as mandatory by the standard but that you have determined you need to use in the form.

**Note:** When you activate a conditional group or segment, the mandatory subordinate segments and elements are activated automatically. A conditional group or segment is used only if there is EDI data available for that element.

The first step in creating a form is to analyze the form requirements. If the analysis you perform is complete, you have all the information you need to create the form in an efficient and logical manner. If you omit this critical step and proceed directly to creating the form, it is likely that creating the form will be a longer and more arduous task, and the form may not work the way you need it to, due to oversights and omissions.

Creating a screen entry or print form for an invoice or purchase order requires several steps. Some steps are performed at the document/message level (such as activating form components), and others are iterative steps that are performed for each group, segment, or element in the form. In the analysis phase, you must determine what EDI data is being sent, as well as what information is required to process the data. The fields on the form must account for all information.

For each segment activated (either mandatory or optional), you must ask the following questions:

- Is the segment a group?
- Does the segment have a maximum use greater than one?
- What elements need to be activated for the segment?

---

## EDI Delimiters

If you are using an EDI standard that contains composite elements or subelements, you must verify that Sterling Gentran:Server is specifying the correct delimiters. Delimiters are flags that you define to the system as separating specific EDI components. Delimiters are necessary for all variable field-length standards, because the data is compressed (and the leading zeroes and trailing blanks are removed). The fields vary in length, so the system needs a flag to determine where one element ends and another begins. For example, an element delimiter marks the beginning of a new element.

**Note:** Although setting EDI delimiters in Sterling Gentran:Server is mandatory only if you are using a standard with composite elements or subelements, we recommend that you perform this task regardless of which standard you use.



This table lists the default EDI delimiters.

Field	ANSI X12		EDIFACT		TRADACOMS	
	Default Char	Default Hex	Default Char	Default Hex	Default Char	Default Hex
Tag Delimiter			+ (plus sign)		= (equal sign)	0x3D
Segment Delimiter	~ (tilde)	0x7E	' (apostrophe)	0x27	' (apostrophe)	0x27
Element Delimiter	* (asterisk)	0x2A	+ (plus sign)	0x2B	+ (plus sign)	0x2B
Sub Element Delimiter	: (colon)	0x3A	: (colon)	0x3A	: (colon)	0x3A
Decimal Separator			. (period)	0x2E	. (full stop)	0x2E
Release Character			? (question mark)	0x3F	? (question mark)	0x3F

## Verifying the Global EDI Date Formats

The Forms Integration subsystem enables you to customize the global EDI date formats for all forms. You can specify the default EDI format of dates for both six- and eight-character dates. When you customize the global EDI date formats, the settings are valid for all forms created in the current session of Sterling Gentran:Server. However, you can override the default date formats for an individual element on the Element Properties dialog for that element.

### About this task

You must verify that you are using the correct global date formats the first time you use Sterling Gentran:Server. Typically, you verify the global EDI date formats one time only. You can change the default date formats if they do not match the formats you intend to use.

Use this procedure to verify the global EDI date formats.

### Procedure

1. Launch the Forms Integration subsystem.
2. Select **Options > Preferences**. The Preferences dialog is a property sheet that enables you to set global defaults for Sterling Gentran:Server.
3. Select the **Standard Formats** tab and verify the default date formats that are used when elements are read from the standards database.
4. Verify that the **Six-character dates** list contains YYMMDD to define the format of the six-character EDI dates in your forms.
5. Verify that the **Eight character dates** list contains YYYYMMDD to define the format of the eight-character EDI dates in your forms.
6. Click **OK** to accept the default date formats for 6- and 8-character date fields and exit the Preferences dialog.

**Note:** To change the order in which the date formats appear in the Six-character dates and Eight character dates lists or to add a new date format to the lists, select **Options > Date Formats**.

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## Tips and Recommendations

### File naming conventions

You allocate a file name to a form when you save the form for the first time or use the Save As function to save a copy of the form under a different name. The name of the form should define the form in a meaningful way.

The default file extension for forms is .STP. Using this extension distinguishes source form files from other types of files, such as compiled translation objects. The naming conventions in Sterling Gentran:Server are as follows:

- The source form (form created in Sterling Gentran:Server) should be named using the file extension .STP.
- The compiled translation object (translation object that is the result of compiling the source form) should be named using the same file name that was allocated to the source form, but with the file extension .TPL.

We recommend that you use these naming conventions to distinguish source forms and compiled translation objects from other types of files. We also recommend that you use the same file name (with different file extensions) for a source form and the translation object that was compiled from it.

When you make a major change to the form, increase the version to the next higher sequential number (for example, 2.0, 3.0). If you make a minor change to the form, increase the release to the next higher sequential number (for example, 2.1, 2.2).

We recommend that you save the form as often as possible, to mitigate the possible loss of additions or modifications in the event of a hardware or system error.

If you have performed any function that invalidates the current format of the translation object, the Save function is unavailable until you regenerate the layout.

### Document names

We recommend that you set up a Document Name for each form to make the identification of a document created by this form easier in Sterling Gentran:Server. This allows you to differentiate between documents in the document browsers in Sterling Gentran:Server. Document names can be up to 255 characters in length.

To set up a Document Name, you must select an element or field in the form that contains data that distinguishes this document. (If you choose a non-string element or field, you need to convert it to a string first.) Then, the Name field of the document browsers that contain this document contain the data from the selected element or field. You can choose any element or field as the Document Name, but we strongly recommend that you select an element or field that occurs only once in the document and has a data type of String.

### Generating

You should regenerate the form periodically as you customize it to ensure that the most recent changes to the frame are reflected in the Layout Window.

When you first generate the form, each field in the Layout Window is labeled with the same name as its corresponding element in the EDI File Format Window. As

you customize the form, however, you change some of the labels and remove others, so all the fields are not labeled the same as their corresponding elements. Even though you change or remove some field labels, each field still corresponds to one element.

## Activating

If you click a group, segment, composite, or element that you did not mean to activate, right-click the component and select Deactivate.

When you activate an element in a print form, the tag Printed is displayed before that element's description to indicate that this field will be printed. If you later prevent a field from being displayed on the printout, then the tag Not Printed is displayed before that element's description.

When you activate an element in a screen entry form, either the tag Edit Box or the tag Drop Down is displayed before that element's description. Edit Box indicates that the element is formatted as a field. Drop Down indicates that the element is formatted as a list because you applied a standard rule that allows a selection of multiple items.

To hide the groups, segments, and elements that you are not using, select View > Show Active Only.

When you activate a conditional group or segment, the mandatory subordinate segments and elements are activated automatically. A conditional group or segment is used only if there is EDI data available for an element contained in it.

When you activate a conditional group, segment, or composite, the mandatory subordinate segments, composites, and elements are activated automatically. A conditional group, segment, or composite is used only if there is EDI data available for an element contained in it.

## Promoting and Changing Segments and Groups

The Promote function extracts one iteration (instance) of a group or repeating segment. Promote is a specialized function that preserves the integrity of the EDI structure. By default, the fields corresponding to each group and repeating segment are displayed on a separate frame from the rest of the fields in the document. When you promote a group to the parent frame, the fields corresponding to the group are displayed on the frame to which the group is subordinate. If you do not promote a group to the parent frame, the fields corresponding to the group are displayed on their own frame.

When you promote a segment, the new segment is defined as mandatory (with a minimum use of one). If you want to make the segment conditional, you must change the minimum use to zero.

Changing the minimum use of a segment or group from zero to one changes the status of the segment or group from conditional to mandatory. If EDI data is not present for a segment or group that has a minimum use of one or greater, a compliance error occurs during translation for that segment or group.

Changing the maximum use of a segment or group changes the maximum number of times the segment or group can be used. A segment or group with a maximum use greater than one repeats (loops), and is placed on a separate frame than the

segment or group to which it is subordinate. A segment or group with a maximum use of one does not repeat, and its fields are displayed on the same frame as the group or segment to which they are subordinate.

If a segment or element occurs more than once in a form, it is identified by its name <ID>. The second and subsequent occurrences are identified by <ID>:n, where n is the number of the occurrence in the form.

## Accumulators

There is only one set of accumulators for each form. This means that accumulator 0, whether it is used in the Primary Accumulator or Alternate Accum box, is the same accumulator with the same content. If you assign calculations to accumulator 0 at the beginning of the form and then use accumulator 0 again later in the form, the content of that accumulator will be the result of the earlier calculation. Any additional calculations you assign to that accumulator will be performed on the content resulting from an earlier calculation.

## Formatting

When the form is generated, the upper left corner of each frame in the form is placed in the upper left corner of the Layout Window.

Use the horizontal ruler at the top of the frame to help you resize the frame. The instructions in this tutorial are given in centimeters. You can toggle from inches to centimeters by double-clicking the yellow square where the vertical and horizontal rulers meet. Use the horizontal ruler to help you find specific locations on the ruler, or to help you measure width. Use the vertical ruler to the left of the frame to help you measure length.

You should be able to view the entire width of the frame. If the right side of the header frame and the vertical scroll bar for the frame are not visible in the Layout Window, move the center bar between the EDI File Format Window and the Layout Window farther to the left so the entire frame is displayed. Alternatively, you can use the horizontal scroll bar at the bottom of the Forms main window to bring the right side of the header frame into view.

Drag the bottom of the frame to the bottom of the Forms window, so that as many of the fields on the frame are displayed as possible.

If a field is not in the part of the frame that currently is displayed, use the scroll bar to scroll down the frame until you locate the hidden fields.

To select more than one field or field label, click and drag the mouse diagonally across all the fields and field labels you want to select. All the fields and field labels completely included within the dragged-across area are selected.

If the template is larger than the frame (there is a scroll bar on the right side of the frame), the static text is displayed in the upper left corner of the part of the template that is displayed, not at the top of the template.

If you format a form component in a way you did not intend, select Display > Undo.

If you forget which unlabeled field contains what data, you can click the field. Its associated element is highlighted in the EDI File Format Window, providing you with a description of the field.

If a field and its corresponding field label move together, the Lock Labels to Fields option is turned on. Click Lock Labels on the Main Toolbar to turn off the Lock Labels option.

## **Screen Entry Forms**

In general, the column width should be wider than the actual content of the column. The extra space that is not used for the content of the column will provide white space separating the columns. If the width for each column is the exact width of the data, then there will not be space separating the columns of data. However, the last column on the screen does not need to be made wider than the content.

The reference is the item (field, field label, list box, or static text) relative to which all other selected items are formatted. The reference is indicated by an outline of diagonal lines, whereas all other selected items are outlined by a solid line. The last item selected in a group of selected items is the reference.



## Chapter 2. About Print Forms

### Purchase Order Components for ANSI X12

#### Mandatory components

For an ANSI X12 purchase order (850), the following groups, segments, and elements have been defined as mandatory by the standards committee. These components are activated automatically when you create a new form:

Group	Segment	Element	Description	Data Type	Length
	BEG		Beginning Segment for Purchase Order		
		BEG01	Transaction Set Purpose Code	String	2
		BEG02	Purchase Order Type Code	String	2
		BEG03	Purchase Order Number	String	22
		BEG05	Purchase Order Date	Dt/Tm	6
PO1			Item Detail		
	CTT		Transaction Totals		
		CTT01	Number of Line Items	Integer	6

#### Required components

This table lists the form components that are required (need to be activated) and are not mandatory for the standard.

Element	Description	Data Type	Length	Code Value/Format to Be Assigned
Note/Special Instruction (NTE Segment)				
NTE02	Free Form Message	String	60	
Reference Numbers (REF Segment)				
REF01	Reference Number Qualifier	String	2	
REF02	Reference Number	String	30	
Terms of Sale/Deferred Terms of Sale (ITD Segment)				
ITD01	Terms Type Code	String	2	
ITD12	Description	String	80	
<b>Name and Address (N1 Group)</b>				
Name (N1 Segment in N1 Group)				
N101	Entity Identifier Code	String	2	BT (Bill to) ST (Ship to) BY (Buying party)
N102	Name	String	35	
Address Information (N3 Segment in N1 Group)				
N301	Address Information	String	35	

Element	Description	Data Type	Length	Code Value/Format to Be Assigned
N302	Address Information	String	35	
Geographic Location (N4 Segment in N1 Group)				
N401	City Name	String	30	
N402	State or Province Code	String	2	
N403	Postal Code	String	9	
<b>Item Detail (PO1 Group)</b>				
Baseline Item Data (PO1 Segment in PO1 Group) (Already Activated)				
PO101	Assigned Identification	String	11	
PO102	Quantity Ordered	Real	9	Format = R6
PO103	Unit or Basis for Measurement Code	String	2	
PO104	Unit Price	Real	14	Format = R2
PO106	Product/Service ID Qualifier	String	2	VN (Vendor) UP (UPC Code)
PO107	Product/Service ID	String	30	
<b>Product/Item Description (PID Group in PO1 Group)</b>				
Product/Item Description (PID:2 Segment in PID Group)				
PID:201	Item Description Type	String	1	
PID:202	Description	String	80	
Date/Time Reference (DTM:2 Segment in PO1 Group)				
DTM:201	Date/Time Qualifier	String	3	010 (Requested Ship) 038 (Ship No Later)
DTM:202	Date	Dt/Tm	6	Screen Format = △MM/DD/YY

## Customization tasks

This table lists the customizing tasks for ANSI X12 described in this tutorial.

Form Component	Description	Customizing Needed
BEG01 element	Transaction Set Purpose Code	This element is required in the purchase order, but is not meaningful for your purposes. You prevent this field from being displayed on the printout.
BEG02 element	Purchase Order Type Code	The code from this element is used to look up the description in a code list table, and the description is printed in another field that you create. You prevent the Purchase Order Type Code field from being displayed on the printout, because the more meaningful description is printed instead.
BEG05 element	Purchase Order Date	The date in the EDI data is in the format "YYMMDD," but you want the date to be printed in the format "MM/DD/YY," so you set the format accordingly.



Form Component	Description	Customizing Needed
REF segment	Reference Numbers	The standard allows this segment to be used up to twelve times in one purchase order, but you and your trading partner have decided to use this segment only once. Therefore, you change the maximum use of this segment from twelve to one.
REF01 element	Reference Number Qualifier	The code from this element is used to look up its description in a code list table, and the description is printed in another field that you create. You prevent the Reference Number Qualifier field from being displayed on the printout, because the more meaningful description is printed instead.
ITD01 element	Terms Type Code	The code from this element is used to look up its description in a code list table, and the description is printed in another field that you create. You prevent the Terms Type Code field from being displayed on the printout, because the more meaningful description is printed instead.
N101 element	Entity Identifier Code	The code from this element is used to look up its description in a code list table, and the description is printed in another field that you create. You prevent the Entity Identifier Code field from being displayed on the printout, because the more meaningful description is printed instead.
N4 segment	Geographic Location	The fields (city, state, postal code) for the N4 segment currently are set up to be printed before the street address from the N3 segment. (The segments are set up this way to allow the N3 segment to repeat, causing the N3 fields to be displayed on a different frame than the one that contains the N1 and N4 fields.) However, this format is not the standard format for an address. You insert a new group and place the N4 segment under the new group so that the address is printed properly.
PO1 group	Baseline Item Data	After you customize and format the fields in the PO1 group, you copy and paste the PO1 group at the same level in the EDI file. The original PO1 group contains column headings for the line item detail, but you prevent the column headings from being printed on the printout for all line items after the first. You change the maximum use of the first PO1 group to one so that the column headings are printed only once (for the first line item). The second PO1 group retains its maximum use of one hundred thousand, allowing up to one hundred thousand line items to be printed on the printout (without printing the column headings for each line item).
PO104 element	Unit Price	Both the EDI data and the printed price are formatted with two explicit decimal places.
PO106 element	Product/Service ID Qualifier	The code from this element is used to look up its description in a code list table, and the description is printed in another field that you create. You prevent the Product/Service ID Qualifier field from being displayed on the printout, because the more meaningful description is printed instead.
PID group	Product/Item Description	The standard allows this group to be used up to one thousand times for each line item. You need this group to be used only once for each line item, so you change the maximum use of this group to one.
DTM segment	Date/Time Reference	The standard allows the date to be used up to ten times for each line item. You need two separate DTM segments: one for the requested ship date, and one for the ship no later date (in that order). You promote this segment to cause another iteration of this segment to occur for each line item. Also, because you know what types of dates you receive (and in what order), you instruct the system to use the key fields function to print the requested ship date in one DTM segment and the ship no later date in the other DTM segment.

Form Component	Description	Customizing Needed
DTM01 element	Date/Time Qualifier	You know that your partner sends you only two types of dates: requested ship and ship no later (in that order), so you use the key fields function in both DTM segments to place the appropriate date in the appropriate DTM02 element. You do not need to load the code list table for the DTM01 element, because you receive only one valid code for this field. You hide this qualifier field.
DTM02 element	Date	The date in the EDI data is in the format "YYMMDD," but you want the date to be printed in the format "MM/DD/YY," so you set the format accordingly.
CTT segment	Transaction Totals	You want this segment to print the total number of line items at the end of the printout. However, if the form were generated now, the total would be printed at the beginning of the printout (because the fields in the CTT segment are displayed on the same frame as the fields in the BEG segment). You change the arrangement of the form, while maintaining the integrity of the EDI data, so the total is printed at the end of the purchase order.

## Purchase Order Components for EDIFACT

### Mandatory components

For an EDIFACT purchase order (ORDERS), the following groups, segments, composites, and elements have been defined as mandatory by the standards committee.

This table describes the components that are activated automatically when you create a new form.

Segment	Composite	Element	Description
BGM			Beginning of Message
DTM			Date/Time/Period
	C507	DTM01	Date/Time/Period Qualifier
UNS			Section Control
		UNS01	Section Identification

### Required components

This table lists the form components that are required (need to be activated) and are not mandatory for the standard.

Element	Description	Data Type	Length	Code Value/Format to Be Assigned
Beginning of Message (BGM Segment) (Already Activated)				
BGM05	Document/Message Number	String	35	
BGM06	Message Function, Coded	String	3	
Date/Time/Period (DTM Segment)				
DTM01	Date/Time/Period Qualifier	String	3	

Element	Description	Data Type	Length	Code Value/Format to Be Assigned
DTM02	Date/Time/Period	String	35	<ul style="list-style-type: none"> <li>• 4 (Change)</li> <li>• 13 (Request)</li> </ul>
Free Text (FTX Segment)				
FTX01	Text Subject Qualifier	String	3	
FTX06	Free Text	String	70	
Reference (RFF Group)				
Reference (RFF Segment)				
RFF01	Reference Qualifier	String	3	
RFF02	Reference Number	String	35	
Name and Address (NAD Group)				
Name and Address (NAD Segment)				
NAD01	Party Qualifier	String	3	<ul style="list-style-type: none"> <li>• AA (Party billed)</li> <li>• BY (Buyer)</li> <li>• ST (Ship to)</li> </ul>
NAD10	Party Name	String	35	
NAD16	Street and Number/P.O. Box	String	35	
NAD17	Street and Number/P.O. Box	String	35	
NAD19	City Name	String	35	
NAD20	Country Sub-Entity Identification	String	9	
NAD21	Postcode Identification	String	9	
Payment Terms Basis (PAT Group)				
Payment Terms Basis (PAT Segment)				
PAT01	Payment Terms Type Qualifier	String	3	<ul style="list-style-type: none"> <li>• 10 (Instant)</li> <li>• 18 (Previously Agreed Upon)</li> </ul>
PAT02	Terms of Payment Identification	String	17	
PAT05	Terms of Payment	String	35	
Line Item (LIN Group)				
Line Item (LIN Segment)				
LIN01	Line Item Number	Number	6	
Additional Product ID (PIA Segment in LIN Group)				
PIA01	Product ID Function Qualifier	String	3	
PIA02	Item Number	String	35	
Item Description (IMD:2 Segment in LIN Group)				
IMD:206	Item Description	String	35	
Measurements (MEA:3 Segment in LIN Group)				

Element	Description	Data Type	Length	Code Value/Format to Be Assigned
MEA:301	Measurement Application Qualifier	String	3	
MEA:305	Measure Unit Qualifier	String	3	
MEA:306	Measurement Value	String	18	Format = R0
Quantity (QTY:3 Segment in LIN Group)				
QTY:301	Quantity Qualifier	String	3	
QTY:302	Quantity	Number	15	Format = N0
Date/Time/Period (DTM:13 Segment in LIN Group)				
DTM:1301	Date/Time/Period Qualifier	String	3	
DTM:1302	Date/Time/Period	String	35	
Monetary Amount (MOA:5 Segment in LIN Group)				
MOA:501	Monetary Amount Type Qualifier	String	3	
MOA:502	Monetary Amount	Number	18	Format = R2
Section Control (UNS Segment)				
UNS01	Section Identification	String	1	
Control Total (CNT Segment)				
CNT01	Control Qualifier	String	3	
CNT02	Control Value	Number	18	Format = N0

## Customization tasks

This table lists the customization tasks for EDIFACT described in this tutorial.

Form Component	Description	Customization Task
BGM05 element	Document/Message Number	You will set up the document name (which enables you to differentiate between messages in the document browsers in Sterling Gentran:Server) in this element. In addition, the standard allows this element to have a maximum length of thirty-five characters, but you expect a string no longer than ten characters from your trading partner. You will change both the maximum length of the element and the display length of the field to ten. Also, you will change the field name to Order Number, which better describes the data in this field for your company.
BGM06 element	Message Function, Coded	The code from this element will be used to look up the description in a code list table, and the description will be printed in another field that you create. You will prevent the Message Function, Coded field from being displayed on the printout, because the more meaningful description will be printed instead.
DTM segment	Date/Time/Period	The standard allows this segment to be used up to thirty-five times in one purchase order, but you and your trading partner have decided to use this segment only once. Therefore, you will change the maximum use of this segment to one.
DTM01 element	Date/Time/Period Qualifier	This element is required in the purchase order, but is not meaningful for your purposes. You will prevent this field from being displayed on the printout.

Form Component	Description	Customization Task
DTM02 element	Date/Time/Period	The standard allows a maximum length of thirty-five characters, but you expect a string no longer than eight characters from your partner. You will change the maximum length of the element and the display length of the field to eight. Also, you will change the field name to Order Date, which better describes the data in this field for your company.
FTX segment	Free Text	The standard allows this segment to be used up to five times in one purchase order, but you and your trading partner have decided to use this segment only once. Therefore, you will change the maximum use of this segment to one.
FTX01 element	Text Subject Qualifier	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being displayed on the printout.
FTX06 element	Free Text	The standard allows a maximum length of seventy characters, but you expect a string no longer than sixty characters from your partner. You will change the maximum length of the element and the display length of the field to sixty. Also, the data in this element will be self-explanatory, so you will remove the label from this field.
RFF group	Reference	The standard allows this group to be used up to ten times in one purchase order, but you and your trading partner have decided to use this group only once. Therefore, you will change the maximum use of this group. Also, you will promote this group so that the fields in this group are placed on the same frame as the related header fields.
RFF01 element	Reference Qualifier	This element is required in the purchase order, but is not meaningful for your purposes. You will prevent this field from being displayed on the printout.
RFF02 element	Reference Number	The standard allows a maximum length of thirty-five characters, but you expect a string no longer than twelve characters from your partner. You will change the maximum length of the element and the display length of the field to twelve. Also, you will change the field name to Contract No., which better describes the data in this field for your company.
NAD01 element	Party Qualifier	The qualifier from this element will be used to look up the description in a code list table, and the description will be printed in another field that you create. You will prevent the Party Qualifier field from being displayed on the printout, because the more meaningful description will be printed instead.
NAD10 element	Party Name	The data in this element will be explained by the qualifier in the Party Qualifier element, so you will remove the label from this field.
NAD16 element	Street and Number/P.O. Box	The data in this element will be self-explanatory, so you will remove the label from this field.
NAD17 element	Street and Number/P.O. Box	The data in this element will be self-explanatory, so you will remove the label from this field.
NAD19 element	City Name	The standard allows a maximum length of thirty-five characters, but you expect a string no longer than thirty characters from your partner. You will change the maximum length of the element and the display length of the field to thirty. Also, the data in this element will be self-explanatory, so you will remove the field label.

Form Component	Description	Customization Task
NAD20 element	Country Sub-Entity Identification	The standard allows a maximum length of nine characters, but you expect a string no longer than two characters from your partner. You will change the maximum length of the element and the display length of the field to two. Also, the data in this element will be self-explanatory, so you will remove the field label.
NAD21 element	Postcode Identification	The data in this element will be self-explanatory, so you will remove the field label.
PAT group	Payment Terms Basis	The standard allows this group to be used up to ten times in one purchase order, but you and your trading partner have decided to use this group only once. Therefore, you will change the maximum use of this group. Also, you will promote this group so that the fields in this group are placed on the same frame as the related header fields.
PAT01 element	Payment Terms Type Qualifier	The qualifier from this element will be used to look up the description in a code list table, and the description will be printed in another field that you create. You will prevent the Payment Terms Type Qualifier field from being displayed on the printout, because the more meaningful description will be printed instead.
PAT02 element	Terms of Payment Identification	This element is required in the purchase order, but is not meaningful for your purposes. You will prevent this field from being displayed on the printout.
PAT05 element	Terms of Payment	The data in this element will be explained by the qualifier in the Terms of Payment Identification element, so you will remove the label from this field.
LIN group	Line Item	After you customize and format the fields in the LIN group, you will copy and paste the LIN group at the same level in the EDI file. The original LIN group will contain column headings for the line item detail, but you will prevent the column headings from being printed for all line items after the first. You will change the maximum use of the first LIN group to one so that the column headings are printed only once (for the first line item). You will change the maximum use of the second LIN group to 199,999. Up to two hundred thousand line items (one from the first LIN group and 199,999 from the second LIN group) can be printed on the printout (without printing the column headings for each line item).
LIN01 element	Line Item Number	The standard allows a maximum length of six characters, but you expect a string no longer than five characters from your partner. You will change the maximum length of the element and the display length of the field to five. Also, you will change the field name to Line, which briefly describes the data in this field.
PIA segment (in LIN group)	Additional Product ID	The standard allows this segment to be used up to twenty-five times for each line item, but you and your trading partner have decided to use this segment only once. Therefore, you will change the maximum use of this segment to one.
PIA01 element	Product ID Function Qualifier	You will change the field name to Code, which more briefly describes the data in this field for your company.
PIA02 element	Item Number	The standard allows a maximum length of thirty-five characters, but you expect a string no longer than six characters from your partner. You will change the maximum length of the element and the display length of the field to six. Also, you will change the field name to Prod ID, which briefly describes the data in this field.

Form Component	Description	Customization Task
IMD segment (in LIN group)	Item Description	The standard allows this segment to be used up to ten times for each line item, but you and your trading partner have decided to use this segment only once. Therefore, you will change the maximum use of this segment to one.
IMD06 element	Item Description	The data in this element will be self-explanatory, so you will remove the label from this field.
MEA segment (in LIN group)	Measurements	The standard allows this conditional segment to be used up to five times for each line item, but you and your trading partner want to use this segment only once. You will change the maximum use of this segment to one. Also, to make this segment mandatory, you will change the minimum use of this segment to one.
MEA01 element	Measurement Application Qualifier	This element is required in the purchase order, but is not meaningful for your purposes. You will prevent this field from being displayed on the printout.
MEA05 element	Measure Unit Qualifier	This element is required in the purchase order, but is not meaningful for your purposes. You will prevent this field from being displayed on the printout.
MEA06 element	Measurement Value	The standard allows a maximum length of eighteen digits, but you expect a number no longer than two digits from your partner. You will change the maximum length of the element and the display length of the field to two. You will change the field name to Unit, which better describes the data in this field for your company. Also, the standard defines the data in this element as being formatted with an explicit decimal point and up to nine decimal places. You will not use decimal places for the data in this field, so you will format both the EDI data and the printed data without decimal places.
QTY segment (in LIN group)	Quantity	The standard allows this segment to be used up to ten times for each line item, but you and your trading partner want to use this segment only once. You will change the maximum use of this segment to one. Also, to make this segment mandatory, you will change the minimum use of this segment to one.
QTY01 element	Quantity Qualifier	This element is required in the purchase order, but is not meaningful for your purposes. You will prevent this field from being displayed on the printout.
QTY02 element	Quantity	The standard allows a maximum length of fifteen digits, but you expect a number no longer than six digits from your partner. You will change the maximum length of the element and the display length of the field to six. You will change the field name to Qty, which briefly describes the data in this field. Also, the standard defines the data in this element as being formatted with an explicit decimal point and up to nine decimal places. You will not use decimal places for the data in this field, so you will format both the EDI data and the printed data with an implicit decimal point and no decimal places.
DTM segment (in LIN group)	Date/Time/Period	The standard allows the date/time/period to be used up to thirty-five times for each line item. You need two separate DTM segments: the required shipment date, and the last delivery date (in that order). You will promote this segment to cause another iteration of this segment to occur for each line item, and then change the maximum use to one because you need to use this segment only once per line item. Also, you know what types of dates you will receive (and in what order), so you will use the key field function to print the required shipment date in one DTM segment and the last delivery date in the other DTM segment.

Form Component	Description	Customization Task
DTM01 element	Date/Time/Period Qualifier	This element is required in the purchase order, but is not meaningful for your purposes. You will prevent this field from being displayed on the printout.
DTM02 element	Date/Time/Period	The standard allows a maximum length of thirty-five characters, but you expect a string no longer than eight characters from your partner. You will change the maximum length of the element and the display length of the field to eight. Also, you will change the field name to Requested (or Ship No for the DTM02 element in the second iteration of the DTM segment), which briefly describes the data in this field.
MOA segment (in LIN group)	Monetary Amount	The standard allows this segment to be used up to five times for each line item, but you and your trading partner have decided to use this segment only once. You will change the maximum use of this segment to one.
MOA01 element	Monetary Amount Type Qualifier	This element is required in the purchase order, but is not meaningful for your purposes. You will prevent this field from being displayed on the printout.
MOA02 element	Monetary Amount	The standard allows a maximum length of eighteen digits, but you expect a number no longer than eight digits from your partner. You will change the maximum length of the element and the display length of the field to eight. You will change the field name to Price, which better describes the data in this field for your company. Also, the standard defines the data in this element as being formatted with an explicit decimal point and up to nine decimal places. You need only two decimal places for the data in this field, so you will format the EDI data and the printed data with two decimal places.
UNS01 element	Section Identification	This element is required in the purchase order, but is not meaningful for your purposes. You will prevent this field from being displayed on the printout.
CNT segment	Control Total Segment	You want this segment to print the total number of line items at the end of the printout. However, if the form were generated now, the total would be printed at the beginning of the printout (because the fields in the CNT segment would be displayed on the same frame as the fields in the BGM segment). You will change the arrangement of the form, while maintaining the integrity of the EDI data, so the total is printed at the end of the purchase order.
CNT01 element	Control Qualifier	This element is required in the purchase order, but is not meaningful for your purposes. You will prevent this field from being displayed on the printout.
CNT02 element	Control Value	The standard allows a maximum length of eighteen digits, but you expect a number no longer than six digits from your partner. You will change the maximum length of the element and the display length of the field to six. You will change the field name to Number of Line Items, which better describes the data in this field for your company. Also, the standard defines the data in this element as being formatted with an explicit decimal point and up to nine decimal places. You will not use decimal places for the data in this field, so you will format both the EDI data and the printed data with an implicit decimal point and no decimal places.



# Purchase Order Components for TRADACOMS

## Mandatory components

For a TRADACOMS ANA001 ORDERS release 9 purchase order, the following groups, segments, composites, and elements have been defined as mandatory by the standards committee.

This table describes the components that are activated automatically when you create a new form.

Group	Segment	Composite	Element	Description	
ORDHDR				Order File Header	
	TYP			Transaction Type Details	
			CD02	Transaction Code	
	SDT			Supplier Details	
		SIDN			
	CDT			Customer Details	
		CIDN			
	FIL				File Details
			FLGN		File Generation Number
			FLVN		File Version Number
		FLDT		File Creation Date	
	CLO			Customer's Location	
		CLOC			
	ORD			Order References	
ORNO					
OLD					
	OTR			Order Trailer	
			LORD	Lines Ordered	

## Required components

This table lists the form components that are required (need to be activated) and are not mandatory for the standard.

Element	Description	Data Type	Length	Code Value/Format to Be Assigned
<b>Order File Header (ORDHDR Group) (Already Activated)</b>				
Supplier Details (SDT Segment) (Already Activated)				
SDT SIDN SID0	Supplier's ANA Location Code	String	13	
SDT SNAM	Supplier's Name	String	40	
Customer Details (CDT Segment) (Already Activated)				
CDT CIDN CID0	Customer's ANA Identity/Loc	String	13	

Element	Description	Data Type	Length	Code Value/Format to Be Assigned
CDT CNAM	Customer's Name	String	40	
CDT CADD CAD0	Customer's Address Line 1	String	35	
CDT CADD CAD1	Customer's Address Line 2	String	35	
CDT CADD CAD2	Customer's Address Line 3	String	35	
CDT CADD CAD3	Customer's Address Line 4	String	35	
CDT CADD CAD4	Customer's Post Code	String	8	
Customer's Location (CLO Segment) (Already Activated)				
CLO CLOC CLO0	Customer's ANA Location Code	String	13	
CLO CNAM	Customer's Name	String	40	
CLO CADD CAD0	Customer's Address Line 1	String	35	
CLO CADD CAD1	Customer's Address Line 2	String	35	
CLO CADD CAD2	Customer's Address Line 3	String	35	
CLO CADD CAD3	Customer's Address Line 4	String	35	
CLO CADD CAD4	Customer's Post Code	String	8	
Order References (ORD Segment) (Already Activated)				
ORD ORNO ORN0	Customer's Order Number	String	17	
ORD ORNO ORN2	Date Order Placed by Customer	Dt/Tm	6	Screen Format = ΔDD/MM/YY
ORD CD07	Order Code	String	1	Any valid code
Delivery Instructions (DIN Segment)				
DIN LDAT	Latest Delivery Date	Dt/Tm	6	Screen Format = ΔDD/MM/YY
Order Line Details (OLD Group) (Already Activated)				
Order Line Details (OLD:2 Segment)				
OLD:2 SPRO SPR1	Supplier's Code for the Traded Unit	String	30	
OLD:2 CPRO CPR1	Customer's Item Code	String	30	
OLD:2 UNOR UNO0	Consumer Units in Traded Unit	String	15	Format = N0
OLD:2 UNOR CD04	Measure Indicator	String	6	
OLD:2 OQTY OQT0	Number of Traded Units Ordered	String	15	Format = N0
OLD:2 OUCT OUC0	Cost Price	Real	14	Screen Format = R4
OLD:2 TDES TDE0	Traded Unit Descr. Line 1	String	40	
OLD:2 TDES TDE1	Traded Unit Descr. Line 2	String	40	

## Customization tasks

This table lists the customization tasks described in this tutorial.

Form Component	Description	Customisation Task
ORDHDR group	Order File Header	You will promote this group so that the fields in this group are placed on the parent frame.
TYP CD02 element	Transaction Code	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
SDT SIDN SID0 element	Supplier's ANA Location Code	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
SDT SNAM element	Supplier's Name	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
CDT CIDN CID0 element	Customer's ANA Identity/Loc	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
CDT CNAM element	Customer's Name	You will change the field name to "Customer", which better describes the data in this field for your company.
CDT CADD CAD0 element	Customer's Address Line 1	The data in this element will be self-explanatory, so you will remove the label from this field.
CDT CADD CAD1 element	Customer's Address Line 2	The data in this element will be self-explanatory, so you will remove the label from this field.
CDT CADD CAD2 element	Customer's Address Line 3	The data in this element will be self-explanatory, so you will remove the label from this field.
CDT CADD CAD3 element	Customer's Address Line 4	The data in this element will be self-explanatory, so you will remove the label from this field.
CDT CADD CAD4 element	Customer's Post Code	The data in this element will be self-explanatory, so you will remove the label from this field.
FIL FILGN element	File Generation Number	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
FIL FILVN element	File Version Number	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
FIL FILDT element	File Creation Date	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
CLO CLOC CLO0 element	Customer's ANA Location Code	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
CLO CNAM element	Customer's Name	You will change the field name to "Location", which better describes the data in this field for your company.
CLO CADD CAD0 element	Customer's Address Line 1	The data in this element will be self-explanatory, so you will remove the label from this field.
CLO CADD CAD1 element	Customer's Address Line 2	The data in this element will be self-explanatory, so you will remove the label from this field.
CLO CADD CAD2 element	Customer's Address Line 3	The data in this element will be self-explanatory, so you will remove the label from this field.

Form Component	Description	Customisation Task
CLO CADD CAD3 element	Customer's Address Line 4	The data in this element will be self-explanatory, so you will remove the label from this field.
CLO CADD CAD4 element	Customer's Post Code	The data in this element will be self-explanatory, so you will remove the label from this field.
ORD ORNO ORN0 element	Customer's Order Number	You will set up the document name (which enables you to differentiate between messages in the document browsers in Sterling Gentran:Server) in this element. Also, you will change the field name to "Order Number", which better describes the data in this field for your company.
ORD ORNO ORN2 element	Date Order Placed by Customer	You will change the field name to "Order Date", which better describes the data in this field for your company. Also, the date in the EDI data will be in the format "YYMMDD", but you want the date to be printed in the format "DD/MM/YY", so you will set the screen format accordingly. In addition, you will change the field and element lengths to reflect the longer date format.
ORD CD07 element	Order Code	The code from this element will be used to look up the description in a code values list, and the description will be printed in another field that you create. You will prevent the Order Code field from being displayed on the printout, because the more meaningful description will be printed instead.
DIN LDAT element	Latest Delivery Date	The date in the EDI data will be in the format "YYMMDD", but you want the date to be printed in the format "DD/MM/YY", so you will set the screen format accordingly. Also, you will change the field and element lengths to reflect the longer date format.
OLD group	Order Line Details	After you customize and format the fields in the OLD group, you will copy and paste the OLD group at the same level in the EDI file. The original OLD group will contain column headings for the line item detail, but you will prevent the column headings from being printed for all line items after the first. You will change the maximum use of the first OLD group to one so that the column headings are printed only once (for the first line item). You will change the maximum use of the second OLD group to 999,998. Up to 999,999 line items (one from the first OLD group and 999,998 from the second OLD group) can be printed on the printout (without printing the column headings for each line item).
OLD:2 SEQA element	First Level Sequence Number	The standard allows a maximum length of ten digits, but you expect a number no longer than five digits from your partner. You will change the maximum length of the element and the display length of the field to five. You will change the field name to "Line", which better describes the data in this field for your company.
OLD:2 SPRO SPR1 element	Supplier's Code for the Traded Unit	The standard allows a maximum length of thirty characters, but you expect a string no longer than ten characters from your partner. You will change the maximum length of the element and the display length of the field to ten. You will change the field name to "Prod ID", which better describes the data in this field for your company.
OLD:2 CPRO CPR1 element	Customer's Item Code	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.

Form Component	Description	Customisation Task
OLD:2 UNOR UNO0 element	Consumer Units in Traded Unit	The standard allows a maximum length of fifteen characters, but you expect a number no longer than ten digits from your partner. You will change the maximum length of the element and the display length of the field to ten. Also, you will change the data type from string to number, and assign EDI and screen formats of N0 (indicating a number with an implicit decimal point and no decimal places). In addition, you will change the field name to "Cons. Units", which better describes the data in this field for your company.
OLD:2 UNOR CD04 element	Measure Indicator	You will change the field name to "Unit", which better describes the data in this field for your company.
OLD:2 OQTY OQT0 element	Number of Traded Units Ordered	The standard allows a maximum length of fifteen characters, but you expect a number no longer than six digits from your partner. You will change the maximum length of the element and the display length of the field to six. Also, you will change the data type from string to number, and assign EDI and screen formats of N0 (indicating a number with an implicit decimal point and no decimal places). In addition, you will change the field name to "Qty Ord", which better describes the data in this field for your company.
OLD:2 OUCT OUC0 element	Cost Price	The standard allows a maximum length of fourteen digits, but you expect a number no longer than ten digits from your partner. You will change the maximum length of the element and the display length of the field to ten. Also, you will change the screen format of the data to R4 (indicating a number with an explicit decimal point and four decimal places). In addition, you will change the field name to "Price Each", which better describes the data in this field for your company.
OLD:2 TDES TDE0 element	Traded Unit Descr. Line 1	The data in this element will be self-explanatory, so you will remove the label from this field.
OLD:2 TDES TDE1 element	Traded Unit Descr. Line 2	The data in this element will be self-explanatory, so you will remove the label from this field.
OTR segment	Order Trailer	You want this segment to print the total number of line items at the end of the printout. However, if the form were generated now, the total would be printed at the beginning of the printout (because the fields in the OTR segment would be displayed on the same frame as the fields in the ORDHDR group). You will change the arrangement of the form, while maintaining the integrity of the EDI data, so the total is printed at the end of the purchase order.
OTR LORD element	Lines Ordered	You will change the field name to "Number of Line Items", which better describes the data in this field for your company.

## Defining the Type of Form

The first task in creating a new form is to define the type of form and EDI standard, version, and message/transaction set (document). In this tutorial, you are creating a print form so that you can print the purchase orders that your partner sends you. Instead of defining the purchase order yourself, you want Sterling Gentran:Server to use the standards database on your system to build the purchase order according to the standard.

### Before you begin

Before you begin this procedure, verify that you have installed the Sterling Standards Database for EDI.

## About this task

Use this procedure to create the new print form.

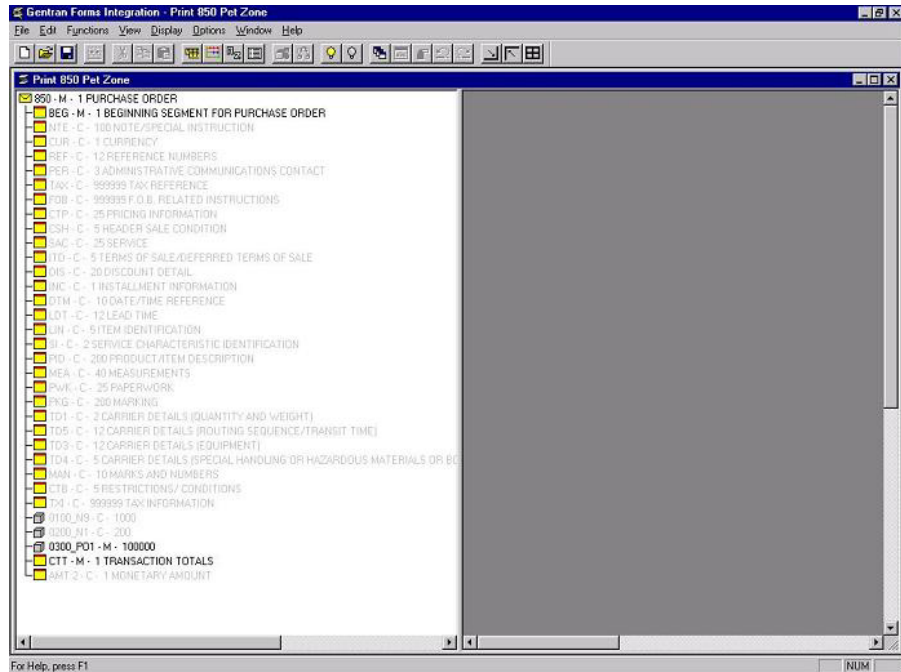
### Procedure

1. Select **File > New** to display the New Form Wizard.
2. From the "What kind of form" list, select **Print**.
3. In the "What is the name of the form" box, enter one of the following:
  - **Print 850 Pet Zone** (for ANSI X12)
  - **Print ORDERS Pet Zone** (for EDIFACT)
  - **Print TRADACOMS ORDERS Pet Zone** (for TRADACOMS)

This description provides a brief explanation of the compiled translation object that enables you to differentiate it from similar translation objects in Sterling Gentran:Server.

4. Verify that your name appears correctly in the "What is your name" box.
5. Click **Next**.
6. Select **Delimited EDI** as the data format syntax that you want to use.
7. Click **Customize**.  
The system displays the New Delimited EDI Wizard.
8. Click **Next**.
9. From the Data Source list, select **Gentran Standards ODBC** data source.
10. Click **Next**.
11. From the Agency list in the Standards section, select one of the following
  - **[X] X12**
  - **[E] Edifact**
  - **[A] Tradacoms**
12. From the Version list, select one of the following:
  - **[003040] ANSI X 12 VERSION 3 RELEASE 4**
  - **[092001] EDIFACT 1992 RELEASE 1**
  - **[ORDERS] ORDER DETAILS** (for TRADACOMS)
13. From the Transaction list, select one of the following:
  - **[850] PURCHASE ORDER** (for ANSI X12 and TRADACOMS)
  - **[ORDERS] PURCHASE ORDER MESSAGE** (for EDIFACT)
14. For TRADACOMS only: From the Release drop-down list, select **9**, which is the message version you will use for this translation object.
15. Click **Next** to continue.
16. Click **Finish**. This may take a few seconds.  
The system displays the New Form Wizard dialog box.
17. Click **Next** to continue.
18. Click **Finish** to create the EDI file (it may take a few seconds to create the file).

The form displayed should look similar to the following. (This is an ANSI X12 example; some details may be different for EDIFACT and TRADACOMS.)



19. Select **Edit > Details**.

The Translation Object Details box is displayed.

20. Verify that **Print** is selected from the Translation Object Function list.

21. In the Major version box, enter **1** to designate the version number for this translation object.

22. In the Minor version box, accept the default value **0** that designates the release number for this translation object.

23. The Input and Output boxes (Agency, Version, Transaction, Release, and F Group) contain information only if the Input and/or Output sides of the form are of EDI format. For this tutorial, do not change the information in these boxes.

**Note:** The system allows you to change the information in the Input and Output boxes, but modifying this information does not alter the content of the form. An example of when you might want to alter these boxes is when you want the form to reflect a standard version that is not loaded on your system. You can change the version on this dialog, and then physically alter the form to be compliant with that version.

24. Click **OK** to save the translation object details.

25. Select **File > Save**.

26. If necessary, navigate to the folder where Sterling Gentran:Server is installed (GENSRVNT\Forms).

27. In the File name box, enter one of the following to replace the default file name:

- **pet\_850p.stp** (for ANSI X12)
- **peteordp.stp** (for EDIFACT)
- **pettordp.stp** (for TRADACOMS)

28. Click **Save** to save the form.

---

## Loading the ORDHDR Message - TRADACOMS

The TRADACOMS standard uses a header with each interchange (ORDHDR for the ORDERS message). The header message contains information that pertains to each message in the interchange. Sterling Gentran:Server copies the header segments to the beginning of each document, to ensure that all the relevant information is contained in the document. Therefore, you need to load the header message (ORDHDR) into the ORDERS EDI file, so that all the segments and elements are available for use.

### About this task

Use this procedure to load the ORDHDR message into the ORDERS EDI file.

### Procedure

1. Click the **ORDERS EDI** file icon.
2. Select **Edit > Create Sub > Transaction Set**. You will be prompted to select an ODBC data source name.
3. Select the appropriate DSN and click **OK** to display the Insert Transaction Set From Standards dialog.
4. From the Agency drop-down list box, select **[A] Tradacoms**.
5. From the Version drop-down list box, select **[ANA001]**.
6. From the Transaction drop-down list box, select **[ORDHDR] ORDER FILE HEADER**.
7. From the Release drop-down list box, select **9**.
8. Click **OK** to load the ORDHDR message into the ORDERS EDI file as a subordinate group.

---

## About Activating PO Groups, Segments, and Elements

When Sterling Gentran:Server generates the form, the system includes all the groups, segments, composites, and elements that are defined by the standard agency for the version of the message/transaction set you selected. The system activates all the groups, segments, composites, and elements that are defined as mandatory by the standard. The system does not enable you to deactivate the mandatory groups, segments, and elements.

To view the segments, composites, and elements in a group, segment, or composite on your form, double-click the form component in the EDI File Format Window (left side of the Forms main window). To activate an inactive form component, click Activate on the Main Toolbar, then click the form component. The component is no longer dimmed.

### Example for ANSI X12

In the example below, the 850 PURCHASE ORDER file icon and BEG segment are mandatory for the purchase order. You do not need to activate these components. The NTE, CUR, and REF segments are not mandatory, so they are dimmed on the form. To view the segments and elements in a group or segment on your form, double-click the form component in the EDI File Format Window (left side of the Forms main window). To activate an inactive form component, click Activate on the Main Toolbar, then click the form component. The component is no longer dimmed.





## Example for EDIFACT

In the example below, the BGM and DTM segments, C507 composite, and DTM01 element are mandatory for the purchase order. You do not need to activate these components. The DTM02 and DTM03 elements are not mandatory, so they are dimmed on the form.



## Example for TRADACOMS

In the example below, the CLO segment and CLO CLOC composite are mandatory for the purchase order. You do not need to activate these components. The CLO CLOC CLO0, CLO CLOC CLO1, CLO CLOC CLO2, and CLO CNAM elements and the CLO CADD composite are not mandatory, so they are dimmed on the form. To view the segments, composites, and elements in a group, segment, or composite on your form, double-click the form component in the EDI File Format Window (left side of the Forms main window). To activate an inactive form component, click Activate on the Main Toolbar, then click the form component. The component is no longer dimmed.



## Activating PO Groups, Segments, and Elements

You must activate ALL required groups, segments, composites, and elements. Failure to do so will hinder your ability to perform steps later in this tutorial.

### About this task

See the following sections for lists of required components:

- Purchase Order Components for ANSI X12
- Purchase Order Components for EDIFACT
- Purchase Order Components for TRADACOMS

These tables list all the groups, segments, and elements that you need to activate. Opening all the necessary groups and segments before you start to activate enables you to scroll down the form and activate the groups, segments, and elements sequentially.

When you activate a conditional group, segment, or composite, the mandatory subordinate segments and elements are activated automatically.

Use this procedure to activate the required groups, segments, composites, and elements.

### Procedure

1. Click **Activate** on the Main Toolbar.
2. Click each inactive group that you need to use.
3. Click each inactive segment that you need to use.
4. Click each inactive composite that you need to use.
5. Click each inactive element that you need to use.
6. Click **Activate** on the Main Toolbar to turn activation mode off.
7. Select **File > Save**.

---

## Verifying EDI Delimiters

### About this task

Use this procedure to verify EDI delimiters.

### Procedure

1. Right-click the purchase order file icon and select **Properties** to display the File Format Properties dialog.
2. Select the **Delimiters** tag.
3. Verify that the correct delimiters are being used for the standard. If the delimiters differ from the default values listed in EDI Delimiters , you can enter either the character or the hexadecimal value in the correct box.

**Note:** If you use the default hex value, the value must begin with **0x** .

4. Click **OK** to save the delimiters and exit the dialog.

**Note:** The Stream segments check box on the Delimiters dialog currently is not selected. For this tutorial, leave it cleared so that the translator will continue to insert a carriage return after every segment.

---

## Form Generation

Generating a form is different from compiling a form. When you compile a form, the source form is translated into a compiled translation object. When you generate a form, the fields of the form are displayed on a frame in the Layout Window (right side of Forms main window), based on the groups, segments, and elements that are activated.

After you generate the form, there is one field on the right side of your screen (Layout Window) for every activated element on the left side of your screen (EDI File Format Window). You can click either the field or its corresponding element to select it. To access the Element Properties dialogue for a field/element, either double-click the element or right-click on the field or element and select Properties.

When the print form is generated, each group and repeating segment has a corresponding frame in the Layout Window that contains all the groups, segments,

and elements at that level. Fields in groups or segments that have a maximum use of only one are displayed on the frame corresponding to the group to which the groups or segments are subordinate.

In print forms, the frames are not titled in the Layout Window. To identify the frame that currently is displayed, click one of the fields on the frame, then check the EDI File Format Window to determine in which segment or group the field is contained.

---

## Generating the Print Form

### About this task

Use this procedure to generate the print form based on the groups, segments, and elements you activated.

### Procedure

1. Select the purchase order file icon.

**Note:** Selecting the file icon before you generate the layout enables you to view the beginning of the purchase order layout in the Layout Window after the layout is generated. However, selecting the file icon is not a required prerequisite to generating the layout.

2. Click **Generate Layout** on the Main Toolbar.

The layout of the print form is displayed in the Layout Window.

---

## About Customizing EDI Data

You can customize the form, including the properties of each group, segment, and element.

Customizing the form is an iterative process. This tutorial guides you through all the steps involved in customizing the form, component by component. When you create print forms, you usually activate the form components you need to use, then compile the form, test it, and print the EDI data using the compiled translation object. As you substantially customize the form, you may need to compile and print the form several times to view your changes before the form truly is finalized.

---

## Finalize the Print Form

### Compiling the PO Form

The Compile function compiles the form. The form that you create using Sterling Gentran:Server is a source form. When that source form is compiled, the result is a compiled translation object.

### About this task

This translation object must be registered with the Sterling Gentran:Server system before you can use it. Use the Compile function after the form is completed and saved.

Use this procedure to compile the form.

## Procedure

1. Select **File > Compile** to display the Run-Time Translation Object Name dialog.

**Important:** Do not to overlay the source form with the compiled translation object. Use the .TPL file extension to distinguish the compiled translation object.

2. Click **Save** to accept the translation object name in the File name box.

The system compiles the form and generates an error report. The error report is displayed in the Compile Errors dialog.

3. Click **OK** to exit the Compile Errors dialog.

**Note:** If the Compile Errors dialog contains errors, you must fix the problems by redoing the appropriate section of the tutorial. Recompile the form after you correct the errors and save the form.

4. Select **Save** from the File menu to save the form.

## Printing the Report

The Sterling Gentran:Server report enables you to validate and review the translation object, and make modifications as needed. If you review the report and determine that the translation object is incorrect, you should reiterate the form creation process as many times as necessary (make the modifications, save the form, recompile the form, and print the report again).

### About this task

Use this procedure to print the Sterling Gentran:Server report.

### Procedure

1. Select **Print** from the File menu to access the Print Options dialog.
2. Click **OK** to accept the defaults on this dialog (all options checked), so the report includes all sections and only the activated form components.
3. To change setup options (to select a specific printer, paper orientation, or size and source of paper), click **Properties** and set the appropriate options.
4. Click **OK** to begin the print process.

## Testing the PO Translation Object

Before you can use the print translation object, you must test the translation object to verify that there are no errors in it. To test the translation object, you must have a file containing test data.

### About this task

The default path for the data file is C:\GENSRVNT\TUTORIAL. Refer to the *IBM Sterling Gentran:Server for Microsoft Windows User Guide* for more information.

Use this procedure to test the print translation object you just created.

### Procedure

1. Register the translation object with Sterling Gentran:Server.
2. Import the partner relationship into Sterling Gentran:Server.
3. Verify (in Partner Editor) that the correct print translation object is selected for the Inbound Relationship.

4. Use the **Process File** option in Sterling Gentran:Server to process the data file through the translation object. The data file is located in the TUTORIAL subfolder under the folder where Sterling Gentran:Server is installed.
5. After the document is translated, it is located in the In Documents in Sterling Gentran:Server. Print the document to ensure that the document was translated correctly and that the printout looks the way you want it to look.



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## Chapter 3. Creating Print Forms for ANSI X12

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### Modifying the Maximum Use of the PO REF Segment

The REF segment contains Reference Numbers (for example, a contract number) used in the EDI data. The standard allows the REF segment to be used up to twelve times in one purchase order. In this tutorial, you expect the REF segment only once from your trading partner, so you change the maximum number of times this segment can be used to one.

#### About this task

Use this procedure to change the maximum use of the REF segment.

#### Procedure

1. Right-click the **REF** segment and select **Properties**.  
The EDI Segment Properties dialog is displayed.
2. Select the **Looping** tab.
3. In the Max Usage box, enter **1** to indicate that this segment can be used only once.
4. Click **OK** to exit the EDI Segment Properties dialog.

---

### Inserting a New N4 Group

The N4 segment (in the N1 group) contains the Geographic Location of the entity or individual named in the N1 segment.

#### About this task

If the form were generated now (displaying the layout of the fields in the form on the right side of the Forms main window), the fields associated with the N4 segment would be located on the same frame as the fields associated with the N1 segment. (In a print form, each group and repeating segment has a corresponding frame that contains all the groups, segments, and elements at that level.) The name would be printed, then the city, state (or province), and postal code would be printed, and then the street address would be printed. This print sequence would not format the address in a standard address format.

To ensure that the city, state (or province), and postal code are printed after the street address, and to maintain the integrity of the purchase order, you must create an N4 group with a minimum use of zero and a maximum use of one. Then, cut the N4 segment and paste it as a subordinate to the group you just created. Making the N4 segment subordinate to the N4 group enables you to retain the N3 segment's maximum use of two and to use the standard address format. The fields associated with the N4 segment (city, state, and postal code) are displayed on a separate frame, which is printed after the street address.

Use this procedure to add a new N4 group.

## Procedure

1. Select the **N3** segment, which is the segment after which you want to insert the group.
2. Select **Edit > Insert > Group**.  
The Group Properties dialog is displayed.
3. In the Name box, enter **NEW\_N4** as the segment loop identification code.
4. In the Description box, enter **NEW N4** to provide a brief explanation of the loop.
5. Click **OK** to create the group.
6. Select the **N4** segment.
7. Click **Cut** on the Main Toolbar.
8. Click **Yes** at the prompt.
9. Select the **NEW\_N4** group, which is the group for which you want to paste the N4 segment as a subordinate.
10. Click **Paste** on the Main Toolbar to paste the N4 segment.
11. At the prompt, accept the default to paste the Clipboard contents as a child (subordinate) of the group and click **OK** to exit the dialog.

---

## Modifying the Maximum Use of the PID Group

If the form were generated now, the fields associated with the PID group (in the PO1 group) would be displayed on a separate frame than the PO1 fields. The PID and PO1 fields all relate to the same set of purchase order items, so all those fields need to be displayed on the same frame. You change the maximum use of the PID group from one thousand to one and set the Promote flag on the group. When you generate the form later in this tutorial, the PID fields are displayed on the same frame as the PO1 fields.

### About this task

Use this procedure to change the maximum use of the PID group.

### Procedure

1. Right-click the **PID** group and select **Properties**.
2. Select the **Looping** tab.
3. In the Max Usage box, enter **1** to indicate that this group can be used only once.
4. Select the **Print** tab.
5. Click the **Promote group to parent frame** check box to display the fields in the PID group on the same frame as the fields in the parent group (PO1 group).

**Note:** If you change the maximum use of this group but do not select **Promote group to parent frame**, the fields in this group are not displayed on the same frame in the Layout Window as the fields in the parent group.

6. Click **OK** to promote the group and exit the Group Properties dialog.



---

## Promoting the DTM:2 Segment

If the form were generated now, the date in the DTM:2 segment (in the PO1 group) for the line item information would be printed on a separate frame than the rest of the line item fields. You want the date to be placed on the same frame as the rest of the line item information, so you need to promote the DTM:2 segment.

### About this task

Your trading partner sends you two sets of dates: the requested date and the ship date (in this order). The DTM:2 segment must occur twice in the form to accommodate both sets of dates from your trading partner. To customize the DTM:2 segment while preserving the integrity of the EDI structure, you must promote the DTM:2 segment, then change the maximum use of the original DTM:2 segment to one so that it is no longer a repeating segment.

Use this procedure to promote the DTM:2 segment.

### Procedure

1. Right-click the **DTM:2** segment and select **Promote** to extract one iteration of the DTM:2 segment and place it directly above the DTM:2 segment that you selected to promote.  
The new iteration of the DTM:2 segment is named DTM:4.
2. Right-click the **DTM:4** segment and select **Properties**.
3. On the **Looping** tab, enter **0** in the Min Usage box to make this segment conditional.
4. Click **OK** to exit the EDI Segment Properties dialog.
5. Right-click the **DTM:2** segment and select **Properties**.
6. On the **Looping** tab, enter **1** in the Max Usage box to allow this segment to be used only once.
7. Click **OK** to exit the EDI Segment Properties dialog.

---

## Creating a CTT Group

The CTT segment is a mandatory segment that can display Transaction Totals for the purchase order. If the form were generated now, the total number of line items would be printed with the BEG fields at the beginning of the printout (because the fields in the CTT segment are displayed on the same frame as the fields in the BEG segment).

### About this task

For the CTT segment to print the total number of line items at the end of the printout and maintain the integrity of the purchase order, you must create a CTT group with a minimum use and a maximum use of one, then cut the CTT segment and paste it as a subordinate to the group you just created. By moving the CTT segment to a new CTT group that you create, the total number of line items are displayed on a frame that is separate from the header (BEG) information.

Use this procedure to create a CTT group.

## Procedure

1. Select the **CTT** segment.
2. Select **Edit > Insert > Group**.  
The Group Properties dialog is displayed.
3. In the Name box, enter **CTT\_Group** as the segment loop identification code.
4. In the Description box, enter **CTT Group** as the segment loop identification code.
5. On the **Looping** tab, enter **1** in the Min Usage box to make this group mandatory.
6. Click **OK** to create the group.
7. Select the **CTT** segment.
8. Click **Cut** on the Main Toolbar.
9. Select the **CTT** group, which is the group for which you want to paste the CTT segment as a subordinate.
10. Click **Paste** on the Main Toolbar to paste the CTT segment.
11. Accept the default to paste the Clipboard contents as a child (subordinate) of the group. Click **OK** to exit the dialog.

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## Chapter 4. Modifying Form Components for ANSI X12

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### Setting up the Document Name for the Print Form

#### About this task

We recommend that you set up a Document Name for each form. The document name makes the identification of a document created by the form easier in Sterling Gentran:Server. Setting up the document name enables you to differentiate between documents in the document browsers. If you set up the document name in the Forms Integration subsystem, the Name field of the document browsers that contain this document in Sterling Gentran:Server contains the data from that element. You can choose any element as the document name, but we strongly recommend that you select an element that occurs only once in the document and has a data type of string. For an ANSI X12 850 purchase order, the document name usually is the Purchase Order Number. For an EDIFACT 92.1 purchase order, the document name usually is the Document/Message Number. For a TRADACOMS ANA001 ORDERS release 9 purchase order, the document name usually is the Customer's Order Number.

Use this procedure to set up the document name.

#### Procedure

1. Double-click one of the following elements:
  - **BEG03** (ANSI X12)
  - **BGM05** (EDIFACT)
  - **ORD ORNO ORNO** (TRADACOMS)

We recommend that you select this element because it is a non-recurring, mandatory element.

The Element Properties dialog is displayed.

2. Select the **Standard Rule** tab.
3. Select the **Update** from the standard rule list.
4. Click **Yes** at the prompt.
5. From the Select the table (or group) to update list, select **Document record**.
6. From the Column (or field) to update list, select **Document Name** to indicate that you are updating the Name field in the document browsers with the contents of the element.
7. Click **OK** to set up the document name.

---

### The BEG Segment

#### Customizing the BEG01 Element

The BEG segment contains the Beginning Segment for the purchase order. This segment uses four mandatory elements: Transaction Set Purpose Code, Purchase Order Type Code, Purchase Order Number, and Purchase Order Date. Each of these elements contains information that is pertinent to the entire purchase order.

## About this task

The BEG01 element (Transaction Set Purpose Code) is a mandatory element for the ANSI X12 850 purchase order. You do not need to print the code on the printout, so you prevent (hide) the Transaction Set Purpose Code field from being printed.

Use this procedure to prevent the Transaction Set Purpose Code field from being printed.

### Procedure

1. Double-click the **BEG01** element.  
The Element Properties dialog is displayed.
2. Select the **Print** tab.
3. Clear the **Include in print** check box to turn the option off.
4. Click **OK** to exit the dialog.

## Customizing the BEG02 Element

The BEG02 element (Purchase Order Type Code) also is a mandatory element for the ANSI X12 850 purchase order. This element contains the two-character code from your partner's EDI data representing the type of purchase order (for example, new order or order change) for this document. You want the more meaningful description of the code to be printed, instead of the code itself. Therefore, you hide the Purchase Order Type Code field, but use the code from that element (BEG02) to look up the code description in the Purchase Order Type Code table and print that description in another field that you create. The description of the code is displayed in the new field on the printout.

## About this task

For this tutorial, you and your trading partner have agreed that they send you these two types of purchase orders:

- New orders (Purchase Order Type Code "NE")
- Purchase order changes (Purchase Order Type Code "CP")

The description of the EDI code in the BEG02 element is important, even though you do not need to print the code itself. For example, the EDI code value "NE" is not descriptive enough for users reading a printout of the purchase order. The description of code "NE" ("New Order") is meaningful, however.

Before you can print the description of the EDI code value, you must create a new element in the BEG segment to store and print the description. The new BEG element is the element that displays the description of the Purchase Order Type Code. You use the Copy and Paste functions to move EDI information in the form. Copied form components retain all the information of the original form components.

Complete the following steps to copy and paste the BEG02 element.

### Procedure

1. Select the **BEG02** element.
2. Click **Copy** on the Main Toolbar.

3. Select the **BEG08** element, which is the last element in the BEG segment. The BEG08 element is the element after which you want the BEG02 element to be pasted.
4. Click **Paste** on the Main Toolbar to paste the BEG02 element.  
A new element (BEG09) is created. The BEG09 element is an exact copy of the BEG02 element.

## Changing the BEG09 Element and Field Properties

The system names the new element created from copying the BEG02 element 0092:2. You rename the new element to identify its purpose, which is to print the description of the code from the BEG02 element.

### About this task

You remove the Mandatory status from the BEG09 element to make it a conditional element (this element is used only if there is EDI data available for it), and increase its length to accommodate the longer description.

Also, you need to change the field label corresponding to the newly-created BEG09 element to reflect the contents of the field (the description of the Purchase Order Type Code). Also, you increase the display length of the field to accommodate the longer description.

Use this procedure to change the element name and length, make the element conditional, and change the field label and field length for the BEG09 element.

### Procedure

1. Double-click the **BEG09** element.
2. In the Name box, enter **0092\_DESC** to give the element a more descriptive identifier.
3. Select the **Validation** tab.
4. Click the **Mandatory** check box to make the element conditional.
5. Enter **0** in the Min box and **30** in the Max box to define the range of characters allowed for this element.
6. Click the **Print** tab.
7. In the Label box, enter **Order Type:** to replace the existing text.
8. In the Maximum number of characters to print box, enter **30** to allow a thirty-character description to be displayed on the printout.
9. Click **OK** to save the new label and exit the dialog.

## Hiding the BEG02 Field and Loading a Code List Table from the Standard

Now that you have created an exact copy of the BEG02 element to retain all of the EDI data and formatting associated with that element, you can hide the first Purchase Order Type Code field.

### About this task

When you use code list tables, you load a code list table from the standard to tell the system which code list table to use in looking up EDI code values. You can load the specific code values you expect to receive in the EDI data, or you can load

the entire code list table. For this tutorial, you know that your trading partner sends you only two types of purchase orders:

- New orders (Purchase Order Type Code "NE")
- Purchase order changes (Purchase Order Type Code "CP")

You do not need to load the entire code list table, so you load only codes "NE" and "CP" from the Purchase Order Code List table.)

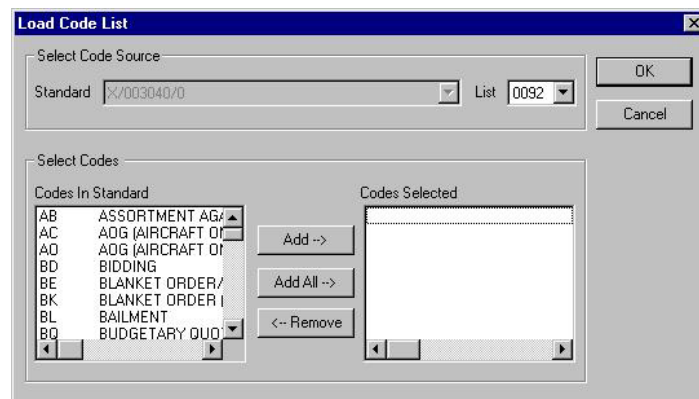
Use this procedure to hide the Purchase Order Type Code field and load the code list table from the standard.

## Procedure

1. Double-click the **BEG02** element. You need to use a code list table for this element.
2. On the **Print** tab, clear the **Include in print** check box to turn the option off.
3. On the **Standard Rule** tab, click the **Use Code** option from the "Please select a standard rule to use" list. Click **Yes** at the prompt.
4. Click **Edit** to access the Edit Code List dialog.

The Table ID box contains 0092, the name of the element for which this code list table is used. The Desc box contains PURCHASE ORDER TYPE CODE, the description of the element for which this code list table is used.

5. Click **Load** to access the Load Code List dialog. The Codes In Standard list contains the entire code list table. you are prompted to select an ODBC data source name. Select the appropriate DSN and click **OK** to access the Load Code List dialog.



6. From the "Codes In Standard" list, highlight code **CP** and click **Add** to move it to the Codes Selected list. Then, highlight code **NE** and click **Add**.
7. Click **OK** to load the code list table and exit the Load Code List dialog.
8. Click **Close** to exit the Edit Code List dialog.
9. From the Store Field list, select **0092\_DESC PURCHASE ORDER TYPE CODE** to store the description in the BEG09 element you created.
10. Click **OK** to exit the dialog.

## Customizing the BEG03 Element

The BEG03 element is a mandatory element that contains the Purchase Order Number. This element is defined by the standard to be a string of twenty-two alphanumeric characters. Your trading partner's purchase order number is always

a ten-character alphanumeric string, so you change the element and field lengths to accommodate the shorter purchase order number. In addition, you rename the field label.

### About this task

Use this procedure to change the field and element lengths, as well as the field label, for the Purchase Order Number field.

#### Procedure

1. Double-click the **BEG03** element.
2. On the **Validation** tab, enter **10** in the Max box to allow a ten-character string in this element.
3. Select the **Print** tab. .
4. In the Label box, enter **Order Number:** to replace the existing text.
5. In the Maximum number of characters to be printed box, enter **10** to allow a ten-character purchase order number to be displayed on the printout.
6. Click **OK** to exit the dialog.

## Customizing the BEG05 Element

The BEG05 element is a mandatory element in the header (BEG) segment of the purchase order that contains the Purchase Order Date. The EDI data from your trading partner is formatted as **YYMMDD**, but you want to format the date as **MM/DD/YY** on the printout. In addition, you rename the field label.

### About this task

Use this procedure to change the date format and the field label for the Purchase Order Date field.

#### Procedure

1. Double-click the **BEG05** element.
2. On the **Validation** tab, enter **8** in the Max box to allow the entire date (including the / separators) to be contained in this element.
3. From the Form Format list, select **MM/DD/YY** to designate the format for the date on the printout.
4. Verify that **YYMMDD** is selected in the File Format list to designate the format for the date in the EDI data.
5. Select the **Print** tab.
6. In the Label box, enter **Order Date:** to replace the existing text.
7. In the Maximum number of characters box, enter **8** to allow the entire date (including the / separators) to be contained in this element.
8. Click **OK** to exit the dialog.
9. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.

The purchase order frame now should look like this:

A screenshot of a form with the following fields and labels:

- Order Number: [text box]
- Order Date: [text box]
- Reference Number Qualifier:
- Reference Number: [text box]
- Order Type: [text box]

---

## Customizing the NTE Segment

Your trading partner sends you messages or notes after the purchase order header information, so the NTE segment should be present to receive each message. The standard allows the NTE segment to be used up to one hundred times in one purchase order.

### About this task

The NTE02 element is a mandatory element that contains the exact message that should be printed. Because the message is self-explanatory, you do not need to print the label for this field. The only customizing that is necessary for the NTE02 element is to remove the field label from the form.

Use this procedure to hide the Free Form Message field label.

### Procedure

1. Double-click the NTE02 element.
2. On the **Print** tab, delete the text in the Label box.
3. Click **OK** to exit the dialog.
4. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.

---

## The REF Segment

### Customizing the PO REF01 Element

The REF segment contains Reference Numbers used in the EDI data. In this tutorial, you know that the only reference number your partner sends you in the REF segment is a contract number that your trading partner uses for their records. Although the standard allows the REF segment to be used up to twelve times in one purchase order, you expect the REF segment only once from your trading partner. You already changed the maximum use of this segment to one.

### About this task

The REF01 element (Reference Number Qualifier) is a mandatory element for the REF segment. The REF01 element contains the two-character code from your partner's EDI data to indicate what type of reference number follows. For this tutorial, you know that your trading partner sends you only one type of reference number—the contract number ("CN"). The system does not enable you to deactivate this element, because it is a mandatory element. However, since you expect only one code in this element, you do not need to print the code on the report. Therefore, you hide the Reference Number Qualifier field.

Use this procedure to hide the Reference Number Qualifier field.



## Procedure

1. Double-click the **REF01** element.
2. On the **Print** tab, clear the **Include in print** check box to turn the option off.
3. Click **OK** to exit the dialog.

## Customizing the PO REF02 Element

The REF02 element is a mandatory element that contains the Reference Number. This element is defined by the standard to be a string of thirty alphanumeric characters. In this tutorial, you know that your trading partner's reference number (the contract number) is always a twelve-character alphanumeric string, so you change the field and element lengths to accommodate the reference number that is shorter than the standard allows. In addition, you rename the field label.

### About this task

Use this procedure to change the field and element lengths, and to change the field label, for the Reference Number field.

### Procedure

1. Double-click the **REF02** element.
2. On the **Validation** tab, enter **12** in the Max box to allow a twelve-character string in this element.
3. Select the **Print** tab.
4. In the Label box, enter **Contract No.** (note the period in the label) to replace the existing text.
5. In the Maximum number of characters box, enter **12** to allow twelve characters to be displayed on the printout.
6. Click **OK** to exit the dialog.
7. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.

---

## The ITD Segment

The ITD segment is a conditional segment that specifies the Terms of Sale/Deferred Terms of Sale for the purchase order. In this tutorial, you already activated the ITD01 and ITD12 elements for the Terms Type Code and Description, respectively. The standard specifies that the ITD segment can be used up to five times in one purchase order. Since this is a conditional segment, if the ITD segment is not used at all in a purchase order (data is not present), the fields are not printed.

The ITD12 element contains the terms of the purchase order. The description of the code in the ITD01 element explains the data in the ITD12 element, so you hide the field label for the ITD12 element.

The ITD01 element contains the Terms Type Code, a two-character code that identifies the terms under which this purchase order is valid. The code itself is not meaningful for a printout, so you hide the ITD01 element and print the description of the code in a new element that you create.

To print the description of an EDI code value, you must copy the ITD01 element to a new element in the ITD segment, then use the new ITD element to print the description of the Terms Type Code.

## Copying the ITD01 Element

### About this task

Use this procedure to copy and paste the ITD01 element.

### Procedure

1. Select the **ITD01** element.
2. Click **Copy** on the Main Toolbar.
3. Select the **ITD15** element, which is the last element in the ITD segment. The ITD15 element is the element after which you want the copied element to be pasted.
4. Click **Paste** on the Main Toolbar to paste the new element. A new element (ITD16) is created, which is an exact copy of the ITD01 element.

## Changing the ITD16 Element and Field Properties

The system names the new element created from copying the ITD01 element 0336:3. You rename the new element to identify its purpose, which is to print the description of the code from the ITD01 element. Also, you increase the element and field lengths to accommodate the longer description.

### About this task

Use this procedure to change the element name and length and change the field label and length for the ITD16 element.

### Procedure

1. Double-click the **ITD16** element.
2. In the Name box, enter **0336\_DESC** to give the name a more descriptive identifier than its current name.
3. On the **Validation** tab, enter **0** in the Min box and **30** in the Max box to define the range of characters for this element.
4. Select the **Print** tab.
5. In the Label box, delete the existing text. The description of the terms type code is self-explanatory and does not require a label.
6. In the Maximum number of characters box, enter **30** to allow thirty characters to be displayed on the printout.
7. Click **OK** to exit the dialog.

## Hiding the ITD01 Field and Loading the Code List Table from the Standard

Now that you have created an exact copy of the ITD01 element to retain all of the EDI data and formatting associated with that element, you can hide the first Terms Type Code field.

### About this task

For this tutorial, you know that your trading partner sends you purchase orders with these two term types:

- Previously agreed upon (Terms Type Code "14")
- Payment due upon (Terms Type Code "23")

You do not need to load the entire code list table, so you load only codes "14" and "23" from the Terms Type Code list table.

Use this procedure to hide the first Terms Type Code field and load the code list table from the standard.

### Procedure

1. Double-click the **ITD01** element. You need to use a code list table for this element.
2. On the **Print** tab, clear the **Include in print** check box to turn the option off.
3. On the **Standard Rule** tab, click the **Use Code** option and click **Yes** at the prompt.
4. Click **Edit** to access the Edit Code List dialog.

**Note:** The Table ID box contains 0336, the name of the element for which this code list table is used. The Desc box contains TERMS TYPE CODE, the description of the element for which this code list table is used.

5. Click **Load** to access the Load Code List dialog.  
You are prompted to select an ODBC data source name.
6. Select the appropriate DSN and click **OK** to access the Load Code List dialog. The Codes In Standard list contains the entire code list table.
7. From the Codes In Standard list, highlight code **14** and click **Add** to move it to the Codes Selected list. Then, highlight code **23** and click **Add**.
8. Click **OK** to load the code list table and exit the Load Code List dialog.
9. Click **Close** to exit the Edit Code List dialog.
10. From the Store Field list, select **0336\_DESC TERMS TYPE CODE** to store the code in the ITD16 element you created.
11. Click **OK** to exit the dialog.

## Customizing the ITD12 Element

The ITD12 element contains the exact terms of the purchase order. The terms are explained by the description of the Terms Type Code, so there is no need to print the label associated with the message. Therefore, you hide the field label for the ITD12 element on the printout.

### About this task

Use this procedure to hide the Description field label.

### Procedure

1. Double-click the **ITD12** element.
2. On the **Print** tab, delete the text in the Label box.
3. Click **OK** to exit the dialog.
4. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.

---

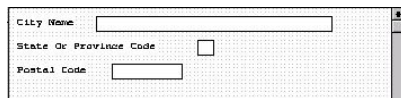
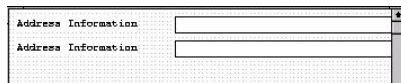
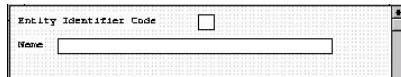
## The N1 Group

The standard allows the N1 group to be used up to two hundred times. In the N1 group, you already activated the N1, N3, and N4 segments to provide the name and address of an entity or individual.

Your trading partner uses three types of addresses:

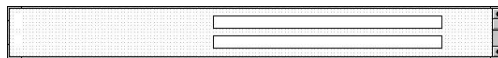

- Bill to name and address
- Ship to name and address
- Buying party name and address

You already inserted an N4 group and moved the N4 segment to be subordinate to the N4 group (so that the city, state or province code, and postal code are printed after the address information). The fields for the N1, N3, and N4 segments are displayed on three frames, like the following. (Your frames may be larger than the ones shown below.)



### After customization

After you customize the N1, N3, and N4 segments, the fields still are displayed on three frames. The frames are printed in order, so that the name is printed first; then the address (one to four lines of address information); then the city, state, and postal code. The address is formatted the way you expect an address to be formatted. After you customize and format the N1 group, the address fields (on three frames) should look like these:



---

## The N1 Segment

The N1 segment identifies the Name of the entity or individual. When the N1 segment is used, the N101 element is mandatory. The N101 element contains the two-character Entity Identifier Code.

You want the more meaningful description of the code to be printed on the printout, instead of the code itself.

The N102 element is a conditional element that identifies the name of the entity or individual. You hide the field label for this field, since the the name is self-explanatory.

For this tutorial, you know that your trading partner sends you these types of names and addresses:

- Bill to name and address (Entity Identifier Code "BT")
- Ship to name and address (Entity Identifier Code "ST")
- Buying party name and address (Entity Identifier Code "BY")

## Copying the N101 Element

### About this task

Use this procedure to copy and paste the N101 element.

### Procedure

1. Select the **N101** element.
2. Click **Copy** on the Main Toolbar.
3. Select the **N106** element, which is the last element in the N1 segment. The N106 element is the element after which you want the N101 element to be pasted.
4. Click **Paste** on the Main Toolbar to paste the new element.

A new element (N107) is created, which is an exact copy of the N101 element.

## Changing the N107 Element and Field Properties

The system names the new element created from copying the N101 element 0098:3. You rename the new element to identify its purpose, which is to print the description of the code from the N101 element. You also remove the Mandatory status from the N107 element to make it a conditional element (the element is used only if there is EDI data available for it) and increase the element and field lengths to accommodate the code description.

### About this task

Use this procedure to change the element name and length, make the element conditional instead of mandatory, and change the field label and field length for the N107 element.

### Procedure

1. Double-click the **N107** element.
2. In the Name box, enter **0098\_DESC** to give the element a more descriptive identifier.
3. Select the **Validation** tab.
4. Clear the **Mandatory** check box to make the element conditional.
5. Enter **0** in the Min box and **30** in the Max box.
6. Select the **Print** tab.
7. In the Label box, delete the existing text.
8. In the Maximum number of characters box, enter **30**.
9. Click **OK** to exit the dialog.

## Hiding the N101 Field and Loading the Code List Table from the Standard

Now that you have created an exact copy of the N101 element in order to retain all of the EDI data and formatting associated with that element, you can hide the first Entity Identifier Code field.

### About this task

For this tutorial, you know that your trading partner sends you the following types of names and addresses:

- Bill to name and address (Entity Identifier Code "BT")
- Ship to name and address (Entity Identifier Code "ST")
- Buying party name and address (Entity Identifier Code "BY")

You do not need to load the entire code list table, so you load only codes BT, ST, and BY from the Entity Identifier Code table.

Use this procedure to hide the first Entity Identifier Code field and load the code list table from the standard.

### Procedure

1. Double-click the **N101** element. You need to use a code list table for this element.
2. On the **Print** tab, clear the **Include this field in the print** check box.
3. On the **Standard Rule** tab, click the **Use Code** option and click **Yes** at the prompt.
4. Click **Edit** to access the Edit Code List dialog.  
The Table ID box contains 0098, the name of the element for which this code list table is used. The Desc box contains ENTITY IDENTIFIER CODE, the description of the element for which this code list table is used.
5. Click **Load**.  
You are prompted to select an ODBC data source name.
6. Select the appropriate DSN and click **OK** to access the Load Code List dialog. The Codes In Standard list contains the entire code list table.
7. From the Codes In Standard list, highlight code **BT** and click **Add** to move it to the Codes Selected list. Highlight code **BY** and click **Add**. Highlight code **ST** and click **Add**.
8. Click **OK** to load the code list table and exit the Load Code List dialog.
9. Click **Close** to exit the Edit Code List dialog.
10. From the Store Field list, select **0098\_DESC ENTITY IDENTIFIER CODE** to store the code in the N107 element you created.
11. Click **OK** to exit the Element Properties dialog.

## Customizing the N102 Element

The N102 element contains the exact name that should be printed. The name is explained by the description of the Entity Identifier Code, so you do not need to print the label associated with the name. The only customizing that is necessary for the N102 element is to hide the field label on the printout.

## About this task

Use this procedure to hide the Name field label.

### Procedure

1. Double-click the **N102** element.
2. On the **Print** tab, delete the text in the Label box.
3. Click **OK** to exit the dialog.

---

## Customizing the N3 Segment

The N3 segment contains the Address of the entity or individual named in the N1 segment. If the N3 segment is used, the N301 element is mandatory. The N301 element contains address information, which identifies the street name, suite number, or any other address information that your trading partner sends you. This element does not contain the city, state/province, or postal code; that data is contained in the N4 segment. You already activated the N302 element, which is a conditional element that contains an additional line of address information (if it is received).

## About this task

The N301 and N302 elements contain the exact address information that should be printed. The address information corresponds to the name that is printed from the N101 element. Therefore, there is no need to print the labels associated with the address information, so you hide the field labels for the N301 and N302 elements.

Use this procedure to hide the Address Information field label.

### Procedure

1. Double-click the **N301** element.
2. On the **Print** tab, delete the text in the Label box.
3. Click **OK** to exit the dialog.
4. Double-click the **N302** element.
5. On the **Print** tab, delete the text in the Label box.
6. Click **OK** to exit the dialog.

---

## Customizing the N4 Segment

The N4 segment (in the NEW\_N4 group in the N1 group) contains the Geographic Location of the entity or individual named in the N1 segment. The N4 segment is not a mandatory segment. The N401 element contains the name of the city, the N402 element contains the code for the state or province, and the N403 element contains the postal code.

## About this task

There is no need to print the labels associated with the geographic location, because it is evident on the printout that the name, address, and geographic location are associated. Therefore, you hide the field labels for the N401, N402, and N403 elements.

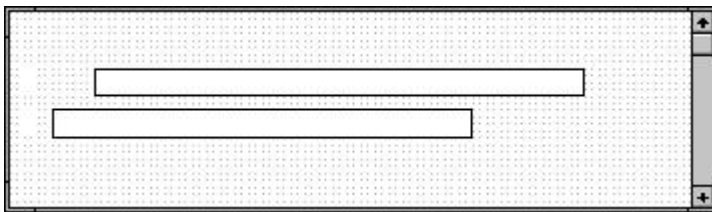
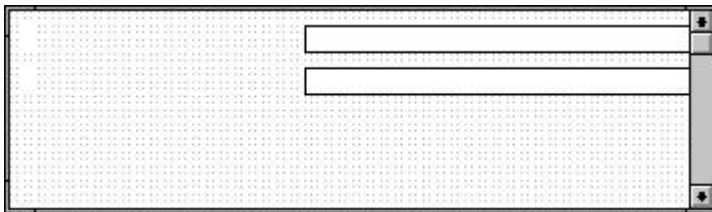
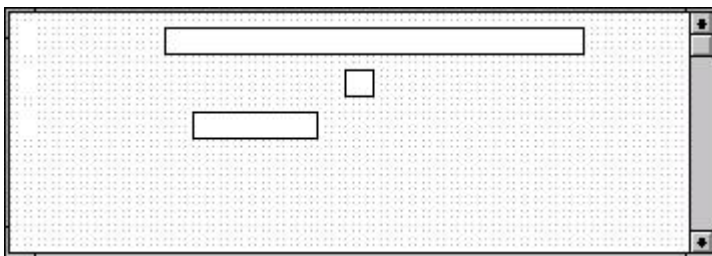
Use this procedure to hide the field labels.

## Procedure

1. To hide the City Name field label, double-click the **N401** element.
2. On the **Print** tab, delete the text in the Label box.
3. Click **OK** to exit the dialog.
4. To hide the State or Province Code field label, double-click the **N402** element.
5. On the **Print** tab, delete the text in the Label box.
6. Click **OK** to exit the dialog.
7. To hide the Postal Code field label, double-click the **N403** element.
8. On the **Print** tab, delete the text in the Label box.
9. Click **OK** to exit the dialog.
10. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.

## Results

The N1, N3, and N4 frames now should look like these (your frames may be larger than the ones shown below):

A screenshot of a form frame with a dotted background. It contains two horizontal rectangular input fields stacked vertically. The top field is longer than the bottom field. On the right side, there is a vertical scrollbar with up and down arrows.A screenshot of a form frame with a dotted background. It contains two horizontal rectangular input fields stacked vertically, positioned towards the right side of the frame. On the right side, there is a vertical scrollbar with up and down arrows.A screenshot of a form frame with a dotted background. It contains one long horizontal rectangular input field at the top, one shorter horizontal rectangular input field below it, and a small square input field to the right of the shorter one. On the right side, there is a vertical scrollbar with up and down arrows.

---

## The PO1 Group

The standard allows the PO1 group to be used up to one hundred thousand times, containing up to one hundred thousand line items in one purchase order. You already activated these segments and group in the PO1 group: PO1 segment, PID group, DTM:4 segment, and DTM:2 segment.



## Before customizing

Before you customize the group, segments, and elements in the PO1 group, the fields in the form are arranged with one field on a line, like the following:

Assigned Identification

Quantity Ordered

Unit Or Basis For Measurement Code

Unit Price

Product/Service Id Qualifier

Product/Service Id

Item Description Type

Description

Date/Time Qualifier

Date

Date/Time Qualifier

Date

If the frames were not customized and formatted differently, then each set of fields would be repeated for each item ordered. A more efficient and traditional way of listing items on a purchase order is to arrange the related information in columns, so all the related information for one item is listed on one or two lines. The column headings are printed only once.

## After customizing

The following figure shows how you ultimately want the fields in the PO1 group to be arranged (after customizing and then formatting the fields).

Line No.	Prod ID	Code Type	Qty Ord	Unit	Price Each	Requested Ship Date	Ship No Letter
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

---

## The PO1 Segment

### Customizing the PO101 Element

The PO1 segment (in the PO1 group) contains the Baseline Item Data that identifies the details of the items on the purchase order. You assign new labels for each of the fields in the PO1 segment to identify more specifically the information your partner sends you. You then change the maximum lengths for some of the fields, and print the description of the Product/Service ID Qualifier.

## About this task

The PO101 element contains the Assigned Identification for one item on the purchase order. Assigned Identification is a general term; you and your trading partner have agreed to call this identification a line number. You change the label for this field to reflect the new field name. You and your trading partner also have agreed that there are no more than 99,999 line items per purchase order. Since each line item is numbered sequentially, starting with one, you need a maximum length of only five digits for this field. You change the maximum length for this field to five.

Use this procedure to change the element and field lengths, field label, and field length for the Assigned Identification field.

### Procedure

1. Double-click the **PO101** element.
2. On the **Validation** tab, enter **5** in the Max box to allow a five-character string in this element.
3. Select the **Print** tab.
4. In the Label box, enter **Line** to replace the existing text.

**Note:** The label for the Assigned Identification field ultimately forms the column heading "Line No." To make the width of the column heading as narrow as possible, you place "Line" on one line and "No." below. The Label box does not enable you to enter a label on more than one line, so you enter "Line" in the Label box, then add "No." by adding static text later in this tutorial.

5. In the Maximum number of characters box, enter **5** to allow five numeric digits to be displayed on the printout.
6. Click **OK** to exit the dialog.

## Customizing the PO102 Element

The PO102 element contains the Quantity Ordered for one item on the purchase order. For brevity on the printout, you rename the field label. The standard allows up to a nine-digit number in this field. You know that your trading partner orders no more than 99,999 (a five-digit number) of any one item, so you change the maximum length to six for this field (for a five-digit number and a place separator) and change the value in the Screen Format and EDI Format lists to "N0" (for a number with an implied decimal point and no decimal places).

## About this task

Use this procedure to change the element length, field label, and field length for the Quantity Ordered field.

### Procedure

1. Double-click the **PO102** element.
2. Select the **Validation** tab.
3. In the Max box, enter **6** to allow a five-digit number and a place separator in this element.
4. From the Form Format list, select **N0** to allow a number with an implicit decimal point and no decimal places to be displayed on the printout.

5. From the File Format list, select **N0** to indicate that you expect a number with an implied decimal point and no decimal places in the EDI data.
6. Select the **Print** tab.
7. In the Label box, enter **Qty** to replace the existing text.
8. In the Maximum number of characters box, enter **6** to allow a five-digit number and a place separator to be displayed on the printout.
9. Click **OK** to exit the dialog.

## Customizing the PO103 Element

The PO103 element contains the Unit or Basis for Measurement Code for each item on the purchase order. For brevity on the printout, you rename the field label.

### About this task

Use this procedure to change the field label of the Unit or Basis for Measurement Code field.

### Procedure

1. Double-click the **PO103** element.
2. On the **Print** tab, enter **Unit** in the Label box to replace the existing text.
3. Click **OK** to exit the dialog.

## Customizing the PO104 Element

The PO104 element contains the Unit Price for each item on the purchase order. For this tutorial, you rename the field label.

### About this task

The standard designates an EDI format of "R9" for the Unit Price field, meaning that the price is formatted with an explicit decimal point and up to nine decimal places. Your trading partner sends you EDI data for the price in "R2" format, and this is also the format you want to use to display the price on the printout (for example, "100.00" instead of "100.000000000"). You change the number formats in the Screen Format and EDI Format fields for this element to reflect the number formats you use.

The standard defines this element as having a maximum length of fourteen, but the items you sell to Pet Zone are not priced at more than \$9,999.99 each, so this field needs a maximum length of only eight (four places for the dollars; two places for the cents; one place for the decimal point; and one place for a plus or minus sign, if present).

Use this procedure to change the element and field lengths, field label, and number formats for the Unit Price field.

### Procedure

1. Double-click the **PO104** element.
2. Select the **Validation** tab.
3. In the Max box, enter **8** to allow eight numeric digits in this field, including a plus or minus sign and a decimal point.
4. From the Form Format list, select **R2** to allow a number with an explicit decimal point and four decimal places to be displayed on the printout.

5. Click **Yes** at the prompt.
6. From the File Format list, select **R2** to indicate that you expect a number with an implicit decimal point and no decimal places.
7. Click **Yes** at the prompt.
8. Select the **Print** tab.
9. In the Label box, enter **Price** to replace the existing text.
10. In the Maximum number of characters box, enter **8**.
11. Click **OK** to exit the dialog.

## Customizing the PO106 Element

The PO106 element contains the Product/Service ID Qualifier for each item on the purchase order. For this tutorial, Pet Zone sends you one of these two types of product codes: VN (Vendor) or UP (UPC Code). For brevity on the printout, you rename the field label.

### About this task

Use this procedure to change the field label for the Product/Service ID Qualifier field.

### Procedure

1. Double-click the **PO106** element.
2. On the **Print** tab, enter **Code** in the Label box.
3. Click **OK** to exit the Element Properties dialog.

## Customizing the PO107 Element

The PO107 element contains the Product/Service ID for one item on the purchase order. For brevity on the printout, you change the field label to "Prod ID." The standard allows up to a thirty-character string in this field. Your trading partner uses product identification numbers that are no longer than ten characters, so you change the maximum length for this field to ten.

### About this task

Use this procedure to change the field and element lengths and the field label for the Product/Service ID field.

### Procedure

1. Double-click the **PO107** element.
2. On the **Validation** tab, enter **10** in the Max box for the maximum number of characters allowed for this element.
3. Select the **Print** tab.
4. In the Label box, enter **Prod ID** to replace the existing text.
5. In the Maximum number of characters box, enter **10** to allow a ten-character string to be displayed on the printout.
6. Click **OK** to exit the dialog.
7. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.

## Results

The PO1 frame now should look like this:

The screenshot shows a form with the following fields and their approximate positions:

- Line: [ ]
- Qty: [ ]
- Unit: [ ]
- Price: [ ]
- Code: [ ]
- Prod ID: [ ]
- Item Description Type: [ ]
- Description: [ ]
- Date/Time Qualifier: [ ]
- Date: [ ]
- Date/Time Qualifier: [ ]
- Date: [ ]

---

## Customizing the PID Group

The PID group contains the item description. The standard allows the PID group to be used up to one thousand times for each line item, but you need the PID group to be used only once for each line item. You already changed the maximum use of the PID group to one and promoted the group to the parent frame.

### About this task

The PID:201 element (in the PID:2 segment in the PID group) contains the Item Description Type ("F" for free-form item description, "S" for structured description, or "X" for semi-structured). This element must be present, because you expect this data from your trading partner. However, you can hide this field, since the meaningful information for a print is the description itself, not the type of description.

The PID:205 element (in the PID:2 segment in the PID group) contains the Description of the purchase order item. The description is self-explanatory, so there is no need to print the field label associated with the message.

Use this procedure to customize the PID group.

### Procedure

1. To hide the Item Description Type field label, double-click the **PID:201** element.
2. On the **Print** tab, clear the **Include fields in the print** check box.
3. Click **OK** to exit the dialog.
4. To hide the Description field label, double-click the **PID:205** element.
5. On the **Print** tab, delete the text in the Label box.
6. Click **OK** to exit the dialog.

## Results

The PO1 frame now should look like this:

The screenshot shows a form with the following fields and their approximate positions:

- Line: [ ]
- Qty: [ ]
- Unit: [ ]
- Price: [ ]
- Code: [ ]
- Prod ID: [ ]
- Date/Time Qualifier: [ ]
- Date: [ ]
- Date/Time Qualifier: [ ]
- Date: [ ]

A horizontal line is drawn across the form, separating the top section from the bottom section.

---

## The DTM:4 Segment

The DTM:4 segment (in the PO1 group) is used to print the requested ship date. To ensure that Sterling Gentran:Server prints the correct date in the Date field, you must use the key field function. The key field function enables you to specify a second qualification in selecting a segment (the segment name is the first qualification). Data must be provided in the order designated through the use of key fields. For example, for this tutorial, you expect the requested ship date (DTM:4) first, and then the ship no later date (DTM:2).

**Important:** For this tutorial, the dates printed in the DTM:4 and DTM:2 segments can be set up using key fields because you expect the dates in a particular order. If the dates were sent in a different order, only one date would be printed. If you were not sure of the order in which your partner sends the dates, you could not use key fields. You would need to use three DTM segments (using the promote function), and two of those DTM segments would need to be identical.

For this tutorial, when the Date/Time Qualifier field contains the value "010" (Requested Ship), then the date is printed in the Date field of the DTM:4 segment. If the Date/Time Qualifier field contains the value "038" (Ship No Later), then the date is printed in the Date field of the DTM:2 segment.

## Using a Key Field for the DTM:4 Segment

### About this task

Use this procedure to use a key field for the DTM:4 segment.

### Procedure

1. Right-click the **DTM:4** segment and select **Properties**.
2. Select the **Key Field** tab.
3. From the Field list, select **0374:9 DATE/TIME QUALIFIER**.

4. Verify that the **Use constant** option is selected.
5. Click **Edit** to access the Map Constants dialog.
6. Click **New** to display the Edit Constant dialog.
7. In the ID box, enter **Requested Ship** to identify the unique literal constant.
8. From the Type list, select **String**.
9. In the Value box, enter **010** to identify the actual value of the constant.
10. Click **OK** to exit the Edit Constant dialog.
11. Click **Close** to exit the Map Constants dialog.
12. From the Use constant list, select **010** to indicate to the system that this date is the requested ship date.
13. Click **OK** to exit the dialog.

## Customizing the DTM:401 Element

The DTM:401 element (in the DTM:4 segment) contains the Date/Time Qualifier for the date in the DTM:402 element. For this tutorial, your trading partner sends you just two types of dates: the requested ship date and the ship no later date (in that order). You used the key field function for the DTM:4 segment to indicate to Sterling Gentran:Server that only the requested ship date is printed in the Date field (DTM:402), so you can prevent the qualifier (DTM:401) from being printed. The ship no later date is printed in the Date field for the DTM:2 segment.

### About this task

Use this procedure to hide the Date/Time Qualifier field.

### Procedure

1. Double-click the **DTM:401** element.
2. On the **Print** tab, clear the **Include fields in the print** check box.
3. Click **OK** to exit the dialog.

## Customizing the DTM:402 Element

The DTM:402 element contains the Date corresponding to the date qualifier in the DTM:401 element. For this tutorial, the DTM:402 element is used to designate when the shipment is requested.

### About this task

In this section of the tutorial, you rename the label for this field (the new label is named Requested). You add the words Ship Date later in this tutorial using static text (static text is text that is always printed when the form is used, and that is not defined in the field properties of the element) so that Ship Date is displayed on the line below Requested. Therefore, the full field label is Requested Ship Date.

The EDI data from your trading partner is formatted as YYMMDD, but you format the date as MM/DD/YY on the printout.

Use this procedure to change the element and field lengths, hide the Date field label, and set the date format for the date on the printout.

## Procedure

1. Double-click the **DTM:402** element.
2. Select the **Validation** tab.
3. In the Max box, enter **8** to allow the entire date (including the / separators) in this element.
4. From the "Format of the data in the form" list, select **MM/DD/YY** to designate the format for the date on the printout.
5. Verify that **YYMMDD** is selected in the "Format of the data in the file" list to designate the format for the date in the EDI data.
6. Select the **Print** tab.
7. In the Label box, enter **Requested** to replace the existing text.

**Note:** The label for the Date field ultimately forms the column heading, Requested Ship Date. To make the width of the column heading as narrow as possible, you place "Requested" on one line and "Ship Date" below. The Label box does not enable you to enter a label on more than one line, so you enter "Requested" in the Label box, then add "Ship Date" by adding static text later in this tutorial.

8. In the Maximum number of characters box, enter **8** to allow the entire date (including the / separators) to be displayed on the printout.
9. Click **OK** to exit the dialog.

---

## The DTM:2 Segment

The DTM:2 segment (in the PO1 group) is used to print the latest date that the order can be shipped. To ensure that Sterling Gentran:Server prints the correct date in the Date field, you must use the key field function. The key field function enables you to specify a second qualification in selecting a segment. Data must be provided in the order designated through the use of key fields. For example, for this tutorial, you expect the requested ship date (DTM:4) first, and then the ship no later date (DTM:2) second.

**Important:** For this tutorial, the dates printed in the DTM:4 and DTM:2 segments can be set up using key fields because you expect the dates in a particular order. If the dates were sent in a different order, then only one date would be printed. If you were not sure of the order in which your partner sends the dates, then you could not use key fields. You would need to use three DTM segments (using the promote function), and two of those DTM segments would need to be identical.

For this tutorial, if the Date/Time qualifier field contains the value "010" (Requested Ship), then the date is printed in the Date field of the DTM:4 segment. If the Date/Time Qualifier field contains the value "038," then the date is printed in the Date field of the DTM:2 segment.

## Using a Key Field for the DTM:2 Segment

### About this task

Use this procedure to use a key field for the DTM:2 segment.

### Procedure

1. Right-click the **DTM:2** segment and select **Properties**.
2. Select the **Key Field** tab.



3. From the Field list, select **0374:6 DATE/TIME QUALIFIER**.
4. Verify that the **Use constant** option is selected.
5. Click **Edit** to display the Map Constants dialog.
6. Click **New** to display the Edit Constant dialog.
7. In the ID box, enter **Ship No Later** to identify the literal constant.
8. From the Type list, select **String**.
9. In the Value box, enter **038** to identify the actual value of the constant.
10. Click **OK** to exit the Edit Constant dialog.
11. Click **Close** to exit the Map Constants dialog.
12. From the Use constant list, select **038** to indicate to the system that this date is the Ship No Later date.
13. Click **OK** to exit the dialog.

## Customizing the PO DTM:201 Element

The DTM:201 element (in the DTM:2 segment) contains the Date/Time Qualifier for the date in the DTM:202 element. For this tutorial, your trading partner sends you just two types of dates: the requested ship date and the ship no later date (in that order). You used the key field function for the DTM:2 segment to indicate to Sterling Gentran:Server that the ship no later date is printed in the DTM:202 field (Date). The DTM:201 element must be present, but you can prevent this field from being displayed, since the meaningful information for a printout is the date itself.

### About this task

Use this procedure to hide the second Date/Time Qualifier field.

#### Procedure

1. Double-click the **DTM:201** element.
2. On the **Print** tab, clear the **Include fields in the print** check box.
3. Click **OK** to exit the dialog.

## Customizing the PO DTM:202 Element

The DTM:202 element contains the Date corresponding to the date qualifier in the DTM:201 element. For this tutorial, the DTM:202 element is used to designate the latest date that shipments should be shipped.

### About this task

In this section of the tutorial, you rename the label for this field (the new label is named Ship No). You add Later further in this tutorial using static text so that Later is displayed on the line below Ship No. The full field label is Ship No Later.

The EDI data from your trading partner is formatted as YYMMDD, but you format the date as MM/DD/YY on the printout.

Use this procedure to change the field and element lengths, hide the Date field label, and set the date format for the date on the printout.

#### Procedure

1. Double-click the **DTM:202** element.
2. Select the **Validation** tab.

3. In the Max box, enter **8** to allow the entire date (including the / separators) in this element.
4. From the "Format of the data in the form" list, select **MM/DD/YY** to designate the format for the date on the printout.
5. Verify that **YYMMDD** is selected in the "Format of the data of the file" list to designate the format for the date in the EDI data.
6. Select the **Print** tab.
7. In the Label box, enter **Ship No** to replace the existing text.
8. In the "Maximum number of characters" box, enter **8** to allow the entire date (including the / separators) to be displayed on the printout.
9. Click **OK** to exit the dialog.
10. Click **Generate Layout** on the Main Toolbar to refresh the display.

## Results

The PO1 frame now should look like this:

The screenshot shows a form layout with the following elements:

- Line**: A text label followed by a rectangular input box.
- Qty**: A text label followed by a rectangular input box.
- Unit**: A text label followed by a small square input box.
- Price**: A text label followed by a rectangular input box.
- Code**: A text label followed by a small square input box.
- Prod ID**: A text label followed by a long horizontal rectangular input box.
- Requested**: A text label followed by a small rectangular input box.
- Ship No**: A text label followed by a rectangular input box with a hatched border.

## What to do next

Now you are ready to format the fields and their labels to make the frame more consistent and visually attractive.

---

## Chapter 5. Formatting the Print Form for ANSI X12

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### About Formatting the Print Form

In the previous section of this tutorial, you customized the print form for a purchase order that you will use to print the data you receive from Pet Zone. After successfully customizing the fields and elements of the print form, you are ready to format the layout of the form.

One form can consist of several frames. Each group and repeating segment has a corresponding frame that contains all the groups, segments, and elements at that level. When the form is printed, the frames are printed consecutively, in the order in which they occur in the form. Each frame is not printed on a separate page.

---

### Resizing the Header Frame

When a printout is produced based on the customized print form, the information is arranged according to how the frames and the fields contained in them were arranged when the form was compiled. You should eliminate unnecessary space as you arrange the fields on each frame.

#### About this task

Use this procedure to resize the header frame.

#### Procedure

1. Click one of the following segments segment to display the Beginning Segment for Purchase Order (header) frame in the Layout Window.
  - **BEG** (for ANSI X12)
  - **BGM** (for EDIFACT)
  - **ORDHDR** (for TRADACOMS)
2. To display more of the form on your screen, click and drag the center bar between the EDI File Format Window and the Layout Window to the left until the Layout Window is wide enough to display as much of the form as you want.
3. To resize the header frame, click and drag the right side of the frame approximately to the 20 cm. mark on the horizontal ruler (a form with a width of 20 cm. can be printed on an 8 1/2" x 11" or A4 sheet of paper).

---

### Adding a Title to the Form

You want the form to have a title designating the standard agency, version, type of document/message, and the trading partner for which this form is used. You add a title to the print form by adding static text.

#### About this task

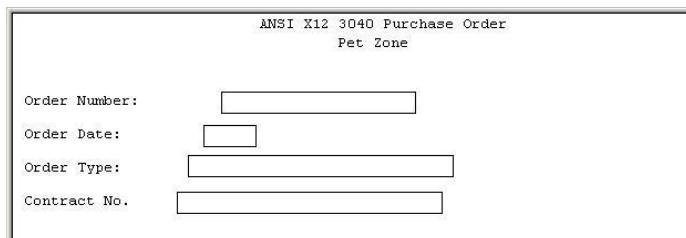
Use this procedure to add and position the title for the form and center it.

## Procedure

1. Select all the fields and field labels on the frame. Drag your selection approximately two or three centimeters lower on the frame to make room at the top of the frame for the title.
2. Click **Add Text** on the Main Toolbar.  
A text box is added to the current frame, displayed in the upper left corner of the frame.
3. In the new selected text box, enter one of the following and click **OK**.
  - **ANSI X12 3040 Purchase Order**
  - **EDIFACT 92.1 Purchase Order**
  - **TRADACOMS ANA001 ORDERS Release 9**
4. Click **Add Text** on the Main Toolbar. Enter **Pet Zone** and click **OK**.
5. Click and drag the first line of static text so that the text is centered on the first line of the frame.
6. Click and drag the second line of static text (**Pet Zone**) so that the text is centered on the second line of the frame.

## Results

The header frame should look similar to the following. (This is an ANSI X12 example; some details may be different for EDIFACT and TRADACOMS.)



ANSI X12 3040 Purchase Order  
Pet Zone

Order Number:

Order Date:

Order Type:

Contract No.

---

## Header Fields

By default, each field and its associated label are printed on their own line. However, it is common for purchase orders and forms to arrange some fields in columns of information.

The first fields you will rearrange are the header fields. For ANSI X12, these fields are associated with the BEG and REF segments. For EDIFACT, these fields are associated with the BGM, DTM, and FTX segments, and the RFF and PAT groups. For TRADACOMS, these fields are associated with the ORDHDR group and the CLO, ORD, and DIN segments.

You prevented some of the field labels from being printed (by removing the field label in the Label box of the Print dialog). For these fields, the fields are displayed on your print form, but their associated labels are not.

## Resizing the Header Fields

When you customized the element properties in the previous section of this tutorial, you changed the display lengths for some of the fields on the header frame. The fields that are displayed in the Layout Window currently reflect the

default display lengths for the fields. To reflect the new sizes of the fields in the Layout Window, you must select the fields for which you changed the display lengths, then resize the fields.

### About this task

Use this procedure to resize the fields on the header frame.

### Procedure

1. Select all the fields on the header frame. (For TRADACOMS, these are the **Latest Delivery Date** and **Order Date** fields.)
2. Select **Display > Size to Length**. The selected fields are resized to the lengths specified in the Maximum number of characters box of the Print dialog for each field.

## Moving Header Fields and Labels - ANSI X12

### About this task

Use this procedure to move and align the fields and labels on the header frame.

### Procedure

1. Select each field individually and drag it closer to its respective field label.  
  
**Important:** Do not move fields that are not labeled.
2. Drag the **Order Date** label and field to the right of the Order Number label and field (at approximately 11.5 cm.).
3. Drag the **Order Type** label and field below the Order Number label and field.
4. Drag the **Contract No.** label and field below the Order Date label and field.
5. Select the **Order Number** and **Order Type** labels. Then select **Display > Align Controls > Left**. The left margins of the Order Type and Order Number labels are aligned.
6. Select the **Order Type** and **Order Number** fields (in that order). Then select **Display > Align Controls > Left**.
7. Select the **Order Date** and **Contract No.** labels (in that order). Then select **Display > Align Controls > Left**.
8. Select the **Order Date** and **Contract No.** fields (in that order). Then select **Display > Align Controls > Left**.
9. Select the **Order Number** and **Order Date** labels and fields. Then select **Display > Align Controls > Left**.
10. Select the **Order Type** and **Contract No.** labels and fields. Then select **Display > Align Controls > Left**.

### Results

The header frame now should look like this:

ANSI X12 3040 Purchase Order			
Pet Zone			
Order Number:	<input type="text"/>	Order Date:	<input type="text"/>
Order Type:	<input type="text"/>	Contract No.:	<input type="text"/>

---

## Arranging the Note Field - ANSI X12

The field that contains any notes or messages for the purchase order is contained on a separate frame than the header fields. To access this frame, select the NTE segment.

### About this task

You prevented the label for the Free Form Message field from being displayed, so you see the field in the layout of your print form, but not its associated label.

In arranging the Free Form Message field and its frame, you first move the field, then you resize the frame to give it the same width as the header frame.

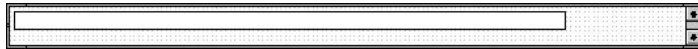
You should move the Free Form Message field so that its left side is aligned with the left sides of the field labels on the header frame and then resize it.

### Procedure

1. Click the **NTE** segment to display the Note frame in the Layout Window.
2. Drag the Free Form Message field to the upper left corner of the Note frame.
3. Click and drag the bottom of the frame to just below the Free Form Message field.
4. Click and drag the right side of the frame to the 20 cm. mark on the horizontal ruler (a form with a width of 20 cm. can be printed on an 8 1/2" x 11" piece of paper).

### Results

The NTE (Note) frame now should look like this:



---

## Arranging the Terms of Sale Fields - ANSI X12

The fields that contain information about the Terms of Sale for the purchase order are contained on another frame. To access this frame, select the ITD segment.

### About this task

You prevented the labels for the Terms Type Code and Description fields from being displayed, so you see the fields in your print form, but not their associated labels.

In arranging the Terms of Sale fields and their frame, you first resize, move, and align the fields, then you resize the frame to give it the same width as the other frames.

Use this procedure to arrange the Terms of Sale fields.

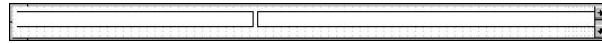
### Procedure

1. Click the **ITD** segment to display the Terms of Sale frame in the Layout Window.

2. Select the **Terms Type Code** and **Description** fields and select **Display > Size to Length**.
3. Drag the **Terms Type Code** field to the upper left corner on the frame.
4. Drag the **Description** field to the right of the Terms Type Code field (on the same line).
5. Select the **Terms Type Code** and **Description** fields and select **Display > Align Controls > Top**.
6. Click and drag the bottom of the frame to just below the Description and Terms Type Code fields.
7. Click and drag the right side of the frame to the 20 cm. mark on the horizontal ruler (a form with a width of 20 cm. can be printed on an 8 1/2" x 11" piece of paper).

## Results

The ITD (Terms of Sale) frame now should look like this:

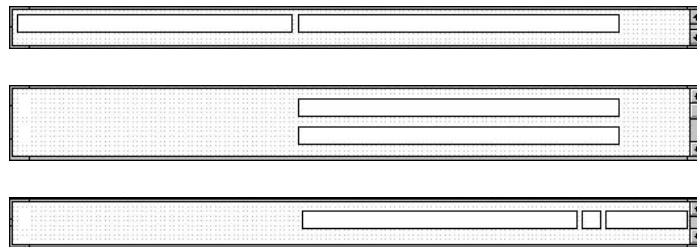



---

## Name and Address Fields - ANSI X12

The fields that contain information about the Names and Addresses for the purchase order are contained on three frames. When you finish formatting all the associated name and address fields, the information printed in these fields is arranged in a standard address format (the name on the first line; the street address on the next four lines; and the city, state, and zip code on the last line). To access the first frame, select the N1 segment.

After you format the fields in the N1 group, the address fields (on three frames corresponding to the N1, N3, and N4 segments) should look like these:



You prevented all the labels for the name and address fields from being displayed, so you see the fields in your print form, but not their associated labels.

In arranging the Name and Address fields and their frames, first you resize the frames to give them the same width as the header frame, then you move and resize the fields.

## Resizing the N1, N3, and N4 Frames

### About this task

Use this procedure to resize the frames.

### Procedure

1. Click the N1 segment to display the Name frame in the Layout Window.

2. Click and drag the right side of the frame to the 20 cm. mark on the horizontal ruler (a form with a width of 20 cm. can be printed on an 8 1/2" x 11" piece of paper).
3. Click the **N3** segment to display the Address Information frame in the Layout Window.
4. Click and drag the right side of the frame to the 20 cm. mark on the horizontal ruler (a form with a width of 20 cm. can be printed on an 8 1/2" x 11" piece of paper).
5. Click the **NEW\_N4** group to display the Geographic Location frame in the Layout Window.
6. Click and drag the right side of the frame to the 20 cm. mark on the horizontal ruler (a form with a width of 20 cm. can be printed on an 8 1/2" x 11" piece of paper).

## Arranging the N1 Fields

### About this task

Use this procedure to arrange the Name fields on the N1 frame.

### Procedure

1. Click the **N1** segment to display the Name frame in the Layout Window.
2. Select the **Entity Identifier Code** field (0098\_DESC) and drag it to the upper left corner on the frame.
3. Select the **Name** field and drag it to right of the Entity Identifier Code field (on the same line).
4. Select the **Entity Identifier Code** and **Name** fields. Then select **Display > Align Controls > Top**.
5. To resize the frame, click and drag the bottom of the frame to just below the Entity Identifier Code and Name fields.

## Arranging the N3 Fields

### About this task

Use this procedure to move the Address Information fields on the N3 frame.

### Procedure

1. Click the **N3** segment to display the Address Information frame in the Layout Window.
2. Select both **Address Information** fields.
3. Click and drag them so that the left margins of the fields begin at approximately 8.3 cm. The Address Information fields are aligned with the Name field on the previous (Name) frame.
4. Select **Display > Align Controls > Left**.
5. To resize the frame, click and drag the bottom of the frame to just below the second Address Information field.

## Arranging the N4 Fields

### About this task

Use this procedure to move the Geographic Location fields on the N4 frame.

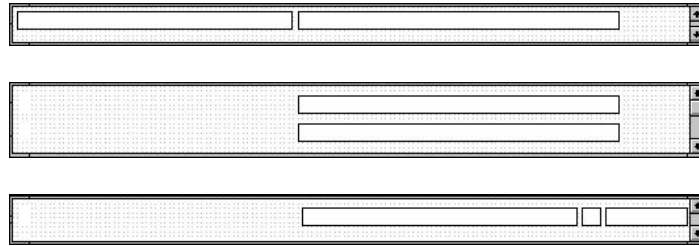


## Procedure

1. Click the **NEW\_N4** group to display the Geographic Location frame in the Layout Window.
2. Click and drag the **City Name** field so that the left margin of the field begins at approximately 8.3 cm. The City Name field is aligned with the Name field on the Name frame, and with the Address Information fields on the Address Information frame.
3. Click and drag the **State or Province Code** field to the right of the City Name field (on the same line).
4. Click and drag the **Postal Code** field to the right of the State or Province Code field (on the same line).
5. Select the **City Name**, **State or Province Code**, and **Postal Code** fields.
6. Select **Align Controls** from the Display menu, then select **Top** from the Align Controls submenu. The tops of the selected items are aligned.
7. To resize the frame, click and drag the bottom of the frame to just below the City Name, State or Province Code, and Postal Code fields.

## Results

The N1, N3, and N4 frames now should look like these:



---

## Line Items Fields

The fields that contain information about each line item for the purchase order are contained on a separate frame.

To access this frame, select the group.

- For ANSI X12, this is the PO1 group.
- For EDIFACT, this is the LIN group.
- For TRADACOMS, this is the OLD group.

You prevented some of the labels from being displayed, so you see the fields in the layout of your print form, but not all of the associated labels. In case you have forgotten which unlabeled field contains what data, you can click the field. The name of the element is highlighted in the EDI File Format Window.

Before you arrange the line items fields and their frame, first you resize the frame to give it the same width as the other frames. Then, you move and resize the fields and field labels, as well as add static text to the form.

The following are the fields in the Line Items frame for each standard:

ANSI X12	EDIFACT	TRADACOMS
Line	Line	Line
Qty	Prod ID	Prod ID
Price	Unit	Cons. Units
Prod ID	Qty	Qty Ord
Requested	Requested	Price Each
Ship No	Ship No	(not applicable)
Description	Price	(not applicable)

## Resizing the Line Item Frame and Fields

### About this task

Use this procedure to resize the Line Items frame.

### Procedure

- Click the group to display the Line Items frame in the Layout Window.
  - PO1 group (for ANSI X12)
  - LIN group (for EDIFACT)
  - OLD group (for TRADACOMS)
- Click and drag the right side of the frame to the 20 cm. mark on the horizontal ruler (a form with a width of 20 cm. can be printed on an 8 1/2" x 11" or A4 sheet of paper).
- Select the fields listed in the table in "Line Items Fields" on page 73, depending on your standard, and select **Display > Size to Length**.

The selected fields are resized to the lengths specified in the Maximum number of characters field of the Print dialog for each field.

## About Column Headings

You can add column headings (using static text) to the frame to change the way the labels are displayed in the form. Currently, each label in this form takes up one line of text.

You need all the horizontal space that is available to arrange the line item fields horizontally. By adding a second line of text to some of the longer labels, more horizontal space is available on the frame.

For ANSI X12 and EDIFACT, you are adding the following lines of static text to the form:

Static Text	Placement on Form
No.	Below the <b>Line</b> field label
Type	Below the <b>Code</b> field label
Ord	Below the <b>Qty</b> field label
Each	Below the <b>Price</b> field label
Ship Date	Below the <b>Requested</b> field label
Later	Below the <b>Ship No</b> field label

For TRADACOMS, you want to label the Line field "Line No." You do not want the label to extend beyond the margins of the field that it labels, so you will place "Line" on one line on the frame and "No." on the line below.

You add all of the static text (column headings and separating lines), then move each line of static text into its proper location. When you finish adding the static text and moving each line of static text to its proper location, the Line Item frame should look similar to the following. (This is an ANSI X12 example; some details may be different for EDIFACT and TRADACOMS.)

Line No.	Prod ID	Code Type	Qty Ord	Unit	Price Each	Requested Ship Date	Ship No Later
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Adding Column Headings

### About this task

Use this procedure to add and position static text.

#### Procedure

1. Select all the fields and field labels on the frame.
2. Click and drag the them to the bottom of the frame. You are arranging the fields at the top of the frame, so moving the fields and field labels out of the way initially gives you room to work with at the top of the frame.
3. For ANSI X12 and EDIFACT: For each of the items listed in below, click **Add Text** on the Main Toolbar, enter the text in the text box, and click **OK**.
  - No.
  - Type
  - Ord
  - Each
  - Ship Date
  - Later

The column headings (static text) you added are displayed in the upper left corner of the frame.

4. For TRADACOMS: In the new text field, enter **No.** (note the full stop included in the text).

**Note:** This field already has a label named "Line". To complete the identification of this field, you will add static text with the name "No." After you add the static text for this field, you will move "No." below "Line" to create a column heading for the fields containing the line item number.

The text you added is displayed in the upper left corner of the frame.

5. Select the static text you just added and drag it to the bottom of the frame. Moving it of the way gives you more room at the top of the frame.

### About Separating Column Headings and Fields

In this print form, rectangular boxes are used to designate fields. The boxes make it easy to distinguish fields from labels and static text. On the printout, there are no rectangular boxes surrounding the data in the fields. The printed field data and the labels tend to look the same on the printout (same typeface, same size text, no boldface or italic type). You can make the labels and static text stand out from the

fields containing the actual data by adding lines separating the labels from the fields. You add static text to the form to add the separating lines.

For ANSI X12 and EDIFACT, you add the following lines of static text (hyphens) to the form:

Static Text	Number of Hyphens	Placement on Form
-----	Six	Below the <b>No.</b> static text
-----	Twelve	Below the <b>Prod ID</b> field label
----	Four	Below the <b>Type</b> static text
-----	Eight	Below the <b>Ord</b> static text
----	Four	Below the <b>Unit</b> field label
-----	Eleven	Below the <b>Each</b> static text
-----	Ten	Below the <b>Ship Date</b> static text
-----	Ten	Below the <b>Later</b> static text

For TRADACOMS, you add the following lines of static text (hyphens) to the form:

Static Text	Number of Hyphens	Placement on Form
-----	Seven	Below the <b>No.</b> static text
-----	Thirteen	Below the <b>Prod ID</b> field label
-----	Eight	Below the <b>Qty Ord</b> field label
-----	Eight	Below the <b>Unit</b> field label
-----	Thirteen	Below the <b>Cons. Units</b> field label
-----	Thirteen	Below the <b>Price Each</b> field label

When you finish adding the static text and moving each line of static text to its proper location, the Line Item frame should look similar to the following. (This is an ANSI X12 example; some details may be different for EDIFACT and TRADACOMS.)

Line No.	Prod ID	Code Type	Qty Ord	Unit	Price Each	Requested Ship Date	Ship No Later
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Adding Lines to Separate Column Headings and Fields

### About this task

You add all of the static text, then move each static text to its proper location. Use this procedure to add and position separating lines in the form.

### Procedure

1. You need to add text boxes (8 for ANSI X12 and EDIFACT; 6 for TRADACOMS) containing hyphens of varying lengths. See About Separating Column Headings and Fields for details.

2. For each of these items, click **Add Text** on the Main Toolbar, enter the appropriate number of hyphens, and click **OK**. The column headings you added are displayed in the upper left corner of the frame.
3. Select all the static text you added and drag it to the bottom of the frame. Moving the static text out of the way gives you more room at the top of the frame.

## Arranging the Frame

The frame now contains all of the fields, column headings, and separating lines that are arranged on the form to create columns of information. Now you are ready to move the fields, labels, static text (column headings), and separating lines to their proper locations on the frame.

### About this task

Use this procedure arrange the items in the frame.

### Procedure

1. To arrange the Line No. column, do the following:
  - Select the **Line** label and drag it to the upper left corner on the frame.
  - Select the **No.** static text and drag it below the Line label.
  - Select the first separating line and drag it below the **No.** static text.
  - Select the **Line** field and drag it below the separating line you just moved.
2. To arrange the Prod ID column, do the following:
  - Select the **Prod ID** label and drag it to the right of the **No.** static text.
  - Select the second separating line and drag it below the **Prod ID** label.
  - Select the **Prod ID** field and drag it below the separating line you just moved.
3. For ANSI X12 and EDIFACT, to arrange the Code Type column, do the following:
  - Select the **Code** label and drag it to the right of the **Prod ID** label (but in the same row as the **Line** label).
  - Select the **Type** static text and drag it below the **Code** label.
  - Select the third separating line (4 hyphens) and drag it below the **Code** label.
  - Select the **Code** field and drag it below the separating line you just moved.
4. For ANSI X12 and EDIFACT, to arrange the Qty Ord column, do the following:
  - Select the **Qty** label and drag it to the right of the **Code** label.
  - Select the **Ord** static text and drag it below the **Qty** label.
  - Select the fourth separating line (8 hyphens) and drag it below the Ord static text.
  - Select the **Qty** field and drag it below the separating line you just moved.
5. For TRADACOMS, to arrange the Qty Ord column, do the following:
  - Select the **Qty Ord** label and drag it to the right of the **Prod ID** label.
  - Select the third separating line (8 hyphens) and drag it below the Ord static text.
  - Select the **Qty Ord** field and drag it below the separating line you just moved.

6. For ANSI X12 and EDIFACT, to arrange the Unit column, do the following:
  - Select the **Unit** label and drag it to the right of the **Ord** static text.
  - Select the fifth separating line (4 hyphens) and drag it below the **Unit** label.
  - Select the **Unit** field and drag it below the separating line you just moved.
7. For TRADACOMS, to arrange the Unit column, do the following:
  - Select the **Unit** label and drag it to the right of the **Qty Ord** label text.
  - Select the fourth separating line (8 hyphens) and drag it below the **Unit** label.
  - Select the **Unit** field and drag it below the separating line you just moved.
8. For TRADACOMS, to arrange the Cons Units column, do the following:
  - Select the **Cons. Units** label and drag it to the right of the **Unit** label.
  - Select the fifth separating line (thirteen hyphens) and drag it below the **Cons. Units** field label.
  - Select the **Cons. Units** field and drag it below the separating line you just moved.
9. For ANSI X12 and EDIFACT, to arrange the Price Each column, do the following:
  - Select the **Price** label and drag it to the right of the **Unit** label (but in the same row as the **Qty** label).
  - Select the **Each** static text and drag it below the **Price** label.
  - Select the sixth separating line (11 hyphens) and drag it below the **Each** static text.
  - Select the **Price** field and drag it below the separating line you just moved.
10. For TRADACOMS, to arrange the Price Each column, do the following:
  - Select the **Price Each** label and drag it to the right of the **Cons. Unit** label.
  - Select the sixth separating line (13 hyphens) and drag it below the **Price Each** static text.
  - Select the **Price Each** field and drag it below the separating line you just moved.
11. For ANSI X12 and EDIFACT, to arrange the Requested Ship Date column, do the following:
  - Select the **Requested** label and drag it to the right of the **Price** label.
  - Select the **Ship Date** static text and drag it below the **Requested** label.
  - Select the seventh separating line (10 hyphens) and drag it below the **Ship Date** static text.
  - Select the **Requested** field and drag it below the separating line you just moved.
12. For ANSI X12 and EDIFACT, to arrange the Ship No Later column, do the following:
  - Select the **Ship No** label and drag it to the right of the **Requested** label.
  - Select the **Later** static text and drag it below the **Ship No** label.
  - Select the eighth separating line (10 hyphens) and drag it below the **Later** static text.
  - Select the **Ship No** field and drag it below the separating line you just moved.
13. To move the **Description** field, click and drag it below the last row of fields.

For EDIFACT, the **Item Description** field will not be placed in a column. Rather, this field will be placed below the other fields on the Line Item (LIN) frame.

For TRADACOMS, drag the **Traded Unit Descr. Line 1** and **Traded Unit Descr. Line 2** fields below the row of fields near the top of the frame.

14. To resize the frame, click and drag the bottom of the frame to just below the description field(s).

## Results

The frame now should look similar to the following. (This is an ANSI X12 example; some details may be different for EDIFACT and TRADACOMS.)

Line No.	Prod ID	Code Type	Qty Ord	Unit	Price Each	Requested Ship Date	Ship No Later
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>							

## Aligning Rows

One of the remaining tasks in formatting the print form is to align the fields, labels, and static text. First, you align the items in rows to give the form a consistent appearance. You align the items in columns.

### About this task

Use this procedure to align the fields, field labels, and static text by row (horizontally).

### Procedure

1. Select the following labels and static text and select **Display > Align Controls > Top**.
  - Line
  - Code
  - Qty
  - Price
  - Requested
  - Ship No
2. Select the following labels and static text and select **Display > Align Controls > Top**.
  - No.
  - Prod ID
  - Type
  - Ord
  - Unit
  - Each
  - Ship Date
  - Later
3. Select all the separating lines between column headings and fields. Then select **Display > Align Controls > Top**.

4. Select the following fields and select **Display > Align Controls > Top**.
  - Line No.
  - Prod ID
  - Code Type
  - Qty Ord
  - Unit
  - Price Each
  - Requested Ship Date
  - Ship No Later

## Aligning Columns

Now, you align the fields, field labels, and static text in columns to help give the form a consistent appearance.

### About this task

Use this procedure to align the fields, field labels, and static text in columns.

### Procedure

1. Select the **Line No.** column heading, its separating line, the **Line No.** field, and the **Description** field. Then select **Display > Align Controls > Left**.
2. Select the **Prod ID** column heading, its separating line, and the **Prod ID** field. Then select **Display > Align Controls > Left**.
3. For ANSI X12 and EDIFACT: Select the **Code Type** column heading, its separating line, and the **Code Type** field. Then select **Display > Align Controls > Left**.
4. Select the **Qty Ord** column heading, its separating line, and the **Qty Ord** field. Then select **Display > Align Controls > Left**.
5. Select the **Unit** column heading, its separating line, and the **Unit** field. Then select **Display > Align Controls > Left**.
6. TRADACOMS only: Select the **Cons. Units** column heading, its separating line, and the **Cons. Units** field. Then select **Display > Align Controls > Left**.
7. Select the **Price Each** column heading, its separating line, and the **Price Each** field. Then select **Display > Align Controls > Left**.
8. For ANSI X12 and EDIFACT: Select the **Requested Ship Date** column heading, its separating line, and the **Requested Ship Date** field. Then select **Display > Align Controls > Left**.
9. For ANSI X12 and EDIFACT: Select the **Ship No Later** column heading, its separating line, and the **Ship No Later** field. Then select **Display > Align Controls > Left**.

### Results

The frame now should look similar to the following. (This is an ANSI X12 example; some details may be different for EDIFACT and TRADACOMS.)

Line No.	Prod ID	Code Type	Qty Ord	Unit	Price Each	Requested Ship Date	Ship No Later
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<hr/>							



## The Line Items Frame

You have completed formatting the Line Items frame so that the line item information is displayed in columns and rows. If you were to register the translation object now and run EDI data through the translation object, you would see that the column headings would be repeated for every line item.

The column headings need to be printed only once, so you will copy and paste the group to create a second group. The formatting in the first group is retained in the second group. You change the maximum use of the first group to one (so that the column headings are printed only once). Then, you remove the column headings in the second group from the area that is printed, leaving only the fields for printing the information on the printout.

- For ANSI X12, the first group is PO1; the second group is PO1:2.
- For EDIFACT, the first group is LIN; the second group is LIN:2.
- For TRADACOMS, the first group is OLD; the second group is OLD:3

For ANSI X12, you change the maximum use of the PO1:2 group to 99,999. Your partner can send you up to 100,000 line items, so the total maximum use of both PO1 groups does not need to exceed 100,000. The maximum use of the PO1:2 group is changed to 99,999.

For EDIFAT, you change the maximum use of the LIN:2 group to 199999. Your partner can send you up to 200,000 line items, so the total maximum use of both LIN groups does not need to exceed 200000. The LIN group retains its maximum use of one, and the maximum use of the LIN:2 group changes to 199999.

For TRADACOMS, you change the maximum use of the OLD:3 group to 999,998. Your partner can send you up to 999,999 line items, so the total maximum use of both OLD groups does not need to exceed 999,999. The maximum use of the OLD group will be changed to one, and the maximum use of the OLD:3 group will be changed to 999,998.

## Copying the Group

### About this task

Use this procedure to copy and paste the group.

### Procedure

1. Select one of the following groups and click **Copy** on the Main Toolbar.
  - **PO1** (for ANSI X12)
  - **LIN** (for EDIFACT)
  - **OLD** (for TRADACOMS)
2. Select **Paste** on the Main Toolbar to paste the second group after the first group.
3. Click the **Paste after selected item (at the same level)** option to paste the Clipboard contents after the original group.
4. Click **OK** to exit the dialog.

For ANSI X12, the pasted PO1 group is renamed PO1:2. For EDIFACT, the pasted group is named LIN:2. For TRADACOMS, the pasted group is named OLD:3.

## Changing the Maximum Use

### About this task

Use this procedure to change the maximum use of the PO1 group and PO1:2 group.

### Procedure

1. Right-click one of the following groups and select **Properties**.
  - **PO1** (for ANSI X12)
  - **LIN** (for EDIFACT)
  - **OLD** (for TRADACOMS)
2. On the **Looping** tab, enter **1** in the Max Usage box to indicate that this group can be used only once in each purchase order.
3. Click **OK** to exit the Group Properties dialog.
4. Right-click one of the following groups and select **Properties**.
  - **PO1:2** (for ANSI X12)
  - **LIN:2** (for EDIFACT)
  - **OLD:3** (for TRADACOMS)
5. Select the **Looping** tab.
6. In the Max Usage box, enter one of the following:
  - **99999** (for ANSI X12)
  - **199999** (for EDIFACT)
  - **999998** (for TRADACOMS)
7. Click **OK** to exit the Group Properties dialog.

## Moving the Column Headings below the Print Area

### About this task

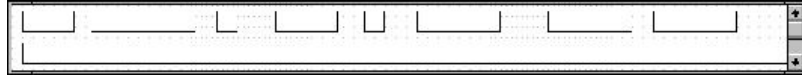
Use this procedure to move the column headings on the second Line Items frame below the print area, so the headings are not printed.

### Procedure

1. Click **Generate Layout** on the Main Toolbar to refresh the display.
2. Select one of the following groups:
  - **PO1:2** (for ANSI X12)
  - **LIN:2** (for EDIFACT)
  - **OLD:3** (for TRADACOMS)
3. Select all of the column headings and separating lines on the frame and drag them below the bottom of the frame so they are not displayed. These items are still included in the print form, but they are not printed.
4. Select all of the fields on the frame and drag them to the top of the frame.
5. To resize the frame, click and drag the bottom of the frame to just below the description field(s).

### Results

The second frame should look similar to the following. (This is an ANSI X12 example; some details may be different for EDIFACT and TRADACOMS.)



---

## Resizing the Transaction Total Frame - ANSI X12

The Number of Line Items field (CTT\_Group group) for the purchase order is contained on a separate frame than the rest of the purchase order information because this field contains summary information that you want to be printed at the bottom of the translation object.

### About this task

You resize the Transaction Total (CTT\_Group) frame to give it the same width as the other frames in the purchase order.

Use this procedure to resize the following steps to resize the Transaction Total frame.

### Procedure

1. Click the **CTT\_Group** group to display the Transaction Total (CTT\_Group) frame in the Layout Window.
2. Click and drag the right side of the frame to the 20 cm. mark on the horizontal ruler (a form with a width of 20 cm. can be printed on an 8 1/2" x 11" sheet of paper).
3. Click and drag the bottom of the frame to just below the Number of Line Items field.
4. Select **Save** from the File menu.

### Results

The CTT\_Group frame now should look like this:



### What to do next

You have completed your Purchase Order form and you are ready to compile the form.



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## Chapter 6. Creating Print Forms for EDIFACT

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### Modifying the PO DTM Segment

The DTM segment contains Date/Time/Period header information (in this tutorial, the order date) used in the EDI data. The standard allows the DTM segment to be used up to 35 times in one purchase order. In this tutorial, you expect the DTM segment only once from your trading partner, so you will change the maximum number of times this segment can be used to one.

#### About this task

Use this procedure to change the maximum use of the DTM segment.

#### Procedure

1. Right-click the **DTM** segment and select **Properties**.
2. On the **Looping** tab, enter **1** in the Max Usage box to indicate that this segment can be used only once.
3. Click **OK** to exit the Segment Properties dialog.

---

### Modifying the FTX Segment

The FTX segment contains Free Text header details in the EDI data. The standard allows the FTX segment to be used up to five times in one purchase order. In this tutorial, you expect the FTX segment only once from your trading partner so you will change the maximum number of times this segment can be used to one.

#### About this task

Use this procedure to change the maximum use of the FTX segment.

#### Procedure

1. Right-click the **FTX** segment and select **Properties**.
2. On the **Looping** tab, enter **1** in the Max Usage box.
3. Click **OK** to exit the Segment Properties dialog.

---

### Modifying the PO RFF Group

If the form were generated now, the fields associated with the RFF group would be displayed on a separate frame than the BGM header fields. The standard allows the RFF group to be used up to 10 times in one purchase order. In this tutorial, you expect the RFF group only once from your trading partner so you will change the maximum number of times the RFF group can be used to one. Also, you need to set the Promote flag on the group so that the RFF fields are placed on the same frame as the BGM fields. After you generate the form later in this tutorial, the RFF fields are displayed on the same frame as the BGM fields.

#### About this task

Use this procedure to change the maximum use of the RFF group and promote the RFF group to the parent frame.

### Procedure

1. Right-click the **RFF** group and select **Properties**.
2. On the **Looping** tab, enter **1** in the Max Usage box.
3. Select the **Print** tab.
4. Select the **Promote group to parent frame** check box to display the fields in the RFF group on the same frame as the fields in the parent group.
5. Click **OK** to promote the group and to exit the Group Properties dialog.

---

## Modifying the PO PAT Group

The standard allows the PAT group to be used up to 10 times in one purchase order. You expect the PAT group only once from your trading partner so you must change the maximum number of times the PAT group can be used to one. Also, you need to set the Promote flag on the group so that the PAT fields are placed on the same frame as the BGM fields. When you generate the form later in this tutorial, the PAT fields will be displayed on the same frame as the BGM fields.

### About this task

Use this procedure to change the maximum use of the PAT group and promote the PAT group to the parent frame.

### Procedure

1. Right-click the **PAT** group and select **Properties**.
2. On the **Looping** tab, enter **1** in the Max Usage box.
3. Select the **Print** tab.
4. Select the **Promote group to parent** frame check box to display the fields in the PAT group on the same frame as the fields in the parent group.
5. Click **OK** to promote the group and exit the Group Properties dialog.

---

## The LIN Group

### Changing the Maximum Use of the PO PIA Segment

The PIA segment in the LIN group contains Line Item details used in the EDI data. The standard allows the PIA segment to be used up to 25 times for each line item. In this tutorial, you expect the PIA segment only once per line item from your trading partner so you will change the maximum number of times this segment can be used for each line item to one.

### About this task

Use this procedure to change the PIA segment's maximum use.

### Procedure

1. Right-click the **PIA** segment and select **Properties**.
2. On the **Looping** tab, enter **1** in the Max Usage box.
3. Click **OK** to exit the Segment Properties dialog.

### Changing the Maximum Use of the PO IMD:2 Segment

The IMD:2 segment (in the LIN group) contains Item Description details used in the EDI data. The standard allows the IMD:2 segment to be used up to 10 times

for each line item. You expect the IMD:2 segment only once per line item from your trading partner so you must change the maximum number of times this segment can be used for each line item to one.

### **About this task**

Use this procedure to change the maximum use of the IMD:2 segment.

#### **Procedure**

1. Right-click the **IMD:2** segment and select **Properties**.
2. On the **Looping** tab, enter **1** in the Max Usage box.
3. Click **OK** to exit the Segment Properties dialog.

## **Changing the Minimum and Maximum Use of the MEA:3 Segment**

The MEA:3 segment in the LIN group contains Measurements details used in the EDI data. The standard allows the MEA:3 segment to be used up to five times for each line item. In this tutorial, you expect the MEA:3 segment only once per line item from your trading partner so you will change the maximum number of times this segment can be used for each line item to one. The standard also allows this segment to be conditional. You and your trading partner agree that the measurements contained in the MEA:3 segment are important to the purchase order, so you will change the minimum use of this segment to one to make it mandatory.

### **About this task**

Use this procedure to change the minimum use and maximum use of the MEA:3 segment.

#### **Procedure**

1. Right-click the **MEA:3** segment and select **Properties**.
2. On the **Looping** tab, enter **1** in the Min Usage box and **1** in the Max Usage box.
3. Click **OK** to exit the Segment Properties dialog.

## **Changing the Minimum and Maximum Use of the QTY:3 Segment**

The QTY:3 segment (in the LIN group) contains Quantity details used in the EDI data. The standard allows the QTY:3 segment to be used up to 10 times for each line item. In this tutorial, you expect the QTY:3 segment only once per line item from your trading partner so you will change the maximum number of times this segment can be used for each line item to one. You and your trading partner agree that the quantities contained in the QTY:3 segment are important to the purchase order so you will change the minimum use of this segment to one.

### **About this task**

Use this procedure to change the minimum use and maximum use of the QTY:3 segment.

## Procedure

1. Right-click the **QTY:3** segment and select **Properties**.
2. On the **Looping** tab, enter **1** in the Min Usage box and **1** in the Max Usage box.
3. Click **OK** to exit the Segment Properties dialog.

## Promoting the DTM:13 Segment

If the form were generated now, the date in the DTM:13 segment in the LIN group for the line item information would be printed on a separate frame than the rest of the line item fields. You want the date to be placed on the same frame as the rest of the line item information so you will promote the DTM:13 segment. Your trading partner sends you two sets of dates: the required shipment date and the last delivery date (in that order). The DTM:13 segment must occur twice in the form to accommodate both sets of dates from your trading partner in the particular order in which you expect them. To customize the DTM:13 segment while preserving the integrity of the EDI structure, you need to promote the DTM:13 segment, then change the maximum use of the original DTM:13 segment to one so that it is no longer a repeating segment.

### About this task

Use this procedure to promote the DTM:13 segment.

### Procedure

1. Right-click the **DTM:13** segment and select **Promote**.
2. Click **Yes** at the prompt to extract one iteration of the DTM:13 segment and place it directly above the DTM:13 segment that you selected to promote.  
The new iteration of the DTM:13 segment is named DTM:27.

## Making the DTM:27 Segment Conditional

### About this task

Use this procedure to make the DTM:27 segment conditional.

### Procedure

1. Right-click the **DTM:27** segment and select **Promote**.  
The Segment Properties dialog is displayed.
2. On the **Looping** tab, enter **0** in the Min Usage box to make this segment conditional.
3. Click **OK** to exit the Segment Properties dialog.

## Changing the Maximum Use of the DTM:13 Segment

### About this task

Use this procedure to change the DTM:13 segment's maximum use.

### Procedure

1. Right-click the **DTM:13** segment and select **Properties**.
2. On the **Looping** tab, enter **1** in the Max Usage box.
3. Click **OK** to exit the Segment Properties dialog.



## Changing the Maximum Use of the MOA:5 Segment

The MOA:5 segment (in the LIN group) contains Monetary Amount details used in the EDI data. The standard allows the MOA:5 segment to be used up to five times for each line item. You expect the MOA:5 segment only once per line item from your trading partner so you need to change the maximum number of times this segment can be used for each line item to one.

### About this task

Use this procedure to change the maximum use of the MOA:5 segment.

### Procedure

1. Right-click the **MOA:5** segment and select **Properties**.
2. On the **Looping** tab, enter **1** in the Max Usage box.
3. Click **OK** to exit the Segment Properties dialog.

---

## The CNT group

The CNT segment contains Control Total summary information for the purchase order. The standard allows the CNT segment to be used up to 10 times in a purchase order. You want to use CNT segment once per purchase order so you need to change the minimum and maximum use of the CNT segment to one. If the form were generated after changing the minimum and maximum use of the CNT segment, the total number of line items would be printed with the BGM fields at the beginning of the purchase order because the fields in the CNT segment would be displayed on the same frame as the fields in the BGM segment.

For the CNT segment to print the total number of line items at the end of the purchase order and maintain the integrity of the purchase order, you must create a CNT group with a minimum use and a maximum use of one, then cut the CNT segment and paste it as a subordinate to the group you just created. After you move the CNT segment to the new CNT group that you create, the total number of line items is displayed on its own frame.

## Creating a CNT Group

### About this task

Use this procedure to create a CNT group.

### Procedure

1. Select the **CNT** segment.
2. Select **Edit > Insert > Group**.  
The Group Properties dialog is displayed.
3. In the Name box, enter **CNT\_Group** as the loop identification code.
4. In the Description box, enter **CNT Group** to provide a brief explanation of the loop.
5. On the **Looping** tab, enter **1** in the Min Usage box to make this group mandatory.
6. Click **OK** to create the group.

## Cutting and Pasting the CNT Segment

### About this task

Use this procedure to cut and paste the CNT segment.

#### Procedure

1. Select the **CNT segment**.
2. Click the **Cut** icon on the Main Toolbar.
3. Click **Yes** at the prompt.
4. Select the **CNT group**, which is the group in which you want to paste the CNT segment as a subordinate.
5. Click **Paste** on the Main Toolbar.
6. At the prompt, accept the default to paste the Clipboard contents as a child (subordinate) of the group and click **OK** to exit the dialog.

## Changing the Maximum Use of the CNT Segment

### About this task

Use this procedure to change the maximum use of the CNT segment to one.

#### Procedure

1. Right-click the **CNT segment** and select **Properties**.
2. On the **Looping** tab, enter **1** in the Max Usage box .
3. Click **OK** to exit the Segment Properties dialog.

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## Chapter 7. Modifying Form Components for EDIFACT

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### Setting up the Document Name for the Print Form

#### About this task

We recommend that you set up a Document Name for each form. The document name makes the identification of a document created by the form easier in Sterling Gentran:Server. Setting up the document name enables you to differentiate between documents in the document browsers. If you set up the document name in the Forms Integration subsystem, the Name field of the document browsers that contain this document in Sterling Gentran:Server contains the data from that element. You can choose any element as the document name, but we strongly recommend that you select an element that occurs only once in the document and has a data type of string. For an ANSI X12 850 purchase order, the document name usually is the Purchase Order Number. For an EDIFACT 92.1 purchase order, the document name usually is the Document/Message Number. For a TRADACOMS ANA001 ORDERS release 9 purchase order, the document name usually is the Customer's Order Number.

Use this procedure to set up the document name.

#### Procedure

1. Double-click one of the following elements:
  - **BEG03** (ANSI X12)
  - **BGM05** (EDIFACT)
  - **ORD ORNO ORNO** (TRADACOMS)

We recommend that you select this element because it is a non-recurring, mandatory element.

The Element Properties dialog is displayed.

2. Select the **Standard Rule** tab.
3. Select the **Update** from the standard rule list.
4. Click **Yes** at the prompt.
5. From the Select the table (or group) to update list, select **Document record**.
6. From the Column (or field) to update list, select **Document Name** to indicate that you are updating the Name field in the document browsers with the contents of the element.
7. Click **OK** to set up the document name.

---

## The BGM Segment

### Customizing the BGM05 Element

The BGM segment is the Beginning of Message segment for the purchase order. This segment contains information that is pertinent to the entire purchase order.

#### About this task

The BGM05 element (Document/Message Number) is defined by the standard to be a string of thirty-five alphanumeric characters. You know that your trading

partner's purchase order number will be a 10-character string, so you will change the element and field lengths to accommodate the shorter purchase order number. In addition, you will rename the field label.

Use this procedure to change the field and element lengths and rename the field label for the Document/Message Number field.

### Procedure

1. Double-click the **BGM05** element.
2. On the **Validation** tab, enter **10** in the Max box for the maximum number of characters allowed for this element.
3. Select the **Print** tab.
4. In the Label box, enter **Order Number:** to replace the existing text.
5. In the Maximum number of characters to be printed box, enter **10** to display a 10-character purchase order number on the printout.
6. Click **OK** to exit the dialog.

## Customizing the BGM06 Element

The BGM06 element (Message Function, Coded) contains the code from your partner's EDI data representing the type of purchase order (for example, new order) for this message. You want the meaningful description of the code to be printed on the printout instead of the code itself. You need to prevent the Message Function, Coded field from being displayed (hide it), but use the code from that element (BGM06) to look up the code description in the Message Function, Coded code list table. You then need to print that description in another field that you create. The description of the code is displayed in the new field on the printout.

### About this task

For this tutorial, your trading partner will only send you two types of purchase orders:

- Request (Message Function Code 13)
- Change (Message Function Code 4)

The description of the EDI code in the BGM06 element is important, though you do not need to print the code itself. For example, the EDI code value 13 is not descriptive enough for users reading a printout of the purchase order. The description of code 13 (Request) is meaningful.

Before you can print the description of the EDI code value, you must create a new element in the BGM segment to store and print the description. The new BGM element is the element that displays the description of the Message Function, Coded. You use the Copy and Paste functions to move EDI information in the form. Copied form components retain all the information of the original form components.

Use this procedure to copy and paste the BGM06 element.

### Procedure

1. Select the **BGM06** element.
2. Click **Copy** on the Main Toolbar.

3. Select the **BGM07** element, which is the last element in the BGM segment. The BGM07 element is the element after which you want the BGM06 element to be pasted.
4. Click **Paste** on the Main Toolbar to paste the BGM06 element. A new element (BGM08) is created, which is an exact copy of the BGM06 element.

## Changing the BGM08 Element and Field Properties

The system names the new element created from copying the BGM06 element 1225:2. You need to rename the new element to identify its purpose, which is to print the description of the code from the BGM06 element.

### About this task

**Note:** If a segment or element occurs more than once in a form, it is identified by its name <ID>. The second and subsequent occurrences are identified by <ID>:n, where n is the number of the occurrence in the form.

You will increase the element and field lengths of the BGM08 element to accommodate the longer description. Also, you will rename the field label for the newly created BGM08 element to reflect the contents of the field (the description of the Message Function, Coded).

Use this procedure to change the element name and length, and change the field label and field length for the Message Function, Coded field.

### Procedure

1. Double-click the **BGM08** element.
2. In the Name box, enter **1225\_DESC**.
3. On the **Validation** tab, enter **0** in the Minimum box and **30** in the Maximum box to define the range of characters allowed for this element.
4. Click the **Print** tab.
5. In the Label box, enter **Order Type:**.
6. In the Maximum number of characters to print box, enter **30**.
7. Click **OK** to save the new label and to exit the dialog.

## Hiding the BGM06 Field and Loading a Code List Table from the Standard

Now that you have created an exact copy of the BGM06 element, you can hide the first Message Function, Coded field.

### About this task

When you use code list tables, you load a code list table from the standard to tell the system which code list table to use in looking up EDI code values. You can load the specific code values you expect to receive in the EDI data, or you can load the entire code list table. Your trading partner will send you two types of purchase orders:

- Request (Message Function Code 13)
- Change (Message Function Code 4)

You do not need to load the entire code list table, so you will load only codes 13 and 4 from the code list table.

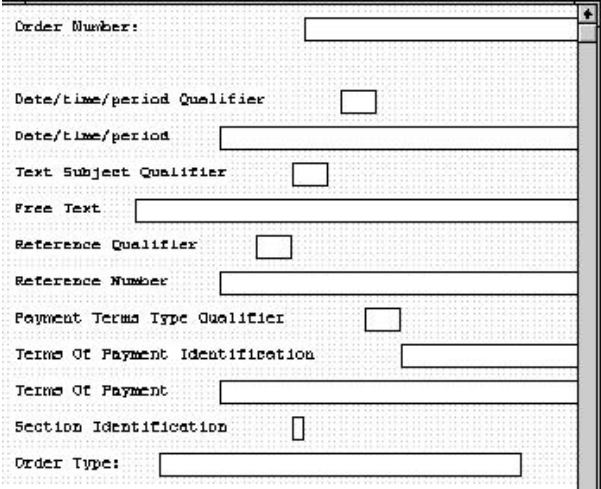
Use this procedure to hide the Message Function, Coded field and load the code list table from the standard.

## Procedure

1. Double-click the **BGM06** element, which is the element for which you need to use a code list table.
2. On the **Print** tab, clear the **Include this field in the print** check box to turn the option off.
3. Select the **Standard Rule** tab.
4. Select **Use Code** from the "Please select a standard rule to use" list.
5. Click **Yes** at the prompt.
6. Click **Edit** to access the Edit Code List dialog.  
The Table ID box contains 1225, the name of the element for which this code list table is used. The Desc box contains MESSAGE FUNCTION, CODED, the description of the element for which this code list table is used.
7. Click **Load** to access the Load Code List dialog. You are prompted to select an ODBC data source name. Select the appropriate DSN and click **OK** to access the Load Code List dialog. The Codes In Standard list contains the entire code list.
8. From the Codes In Standard list, highlight code **13** and click **Add** to move it to the Codes Selected list. Then, highlight code **4** and click **Add**.
9. Click **OK** to load the code list table and exit the Load Code List dialog.
10. Click **Close** to exit the Edit Code List dialog.
11. From the Store Field list, select **1225\_DESC MESSAGE FUNCTION, CODED** to store the description in the BGM08 element you created.
12. Click **OK** to exit the dialog.
13. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.

## Results

The header frame now should look like this:



The screenshot shows a print form header frame with the following fields and checkboxes:

- Order Number:
- Date/time/period Qualifier:
- Date/time/period:
- Text Subject Qualifier:
- Free Text:
- Reference Qualifier:
- Reference Number:
- Payment Terms Type Qualifier:
- Terms Of Payment Identification:
- Terms Of Payment:
- Section Identification:
- Order Type:

---

## Customizing the DTM Segment

The DTM segment (Date/Time/Period) is used to print the order date for the purchase order. The standard allows the DTM segment to be used up to 35 times in one purchase order. In this tutorial, you will use the DTM segment only once. You have already changed the maximum use of the DTM segment to obtain just one instance of the DTM segment and to place the order date on the same frame as the order number.

### About this task

The DTM01 element (Date/Time/Period Qualifier) is a mandatory element for the EDIFACT 92.1 purchase order (ORDERS). You do not need to print the qualifier on the printout so you will hide the Date/Time/Period Qualifier field.

The DTM02 element (Date/Time/Period) contains the purchase order date. The standard allows this field to contain up to a 35-character string, but your trading partner sends you shorter dates. You need to change the element and field lengths to accommodate the shorter dates, and then rename the field label.

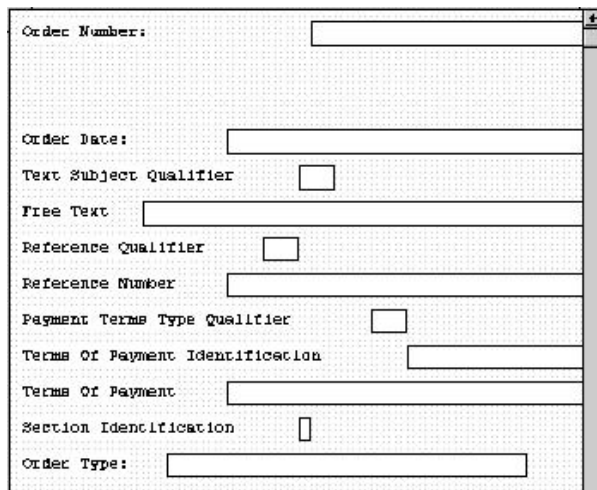
Use this procedure to customize the DTM segment.

### Procedure

1. To hide the Date/Time/Period Qualifier field, double-click the **DTM01** element.
2. On the **Print** tab, clear the **Include this field in the print** check box to turn the option off.
3. Click **OK** to exit the dialog.
4. To customize the Date/Time/Period field, double-click the **DTM02** element.
5. On the **Validation** tab, enter **8** in the Maximum box to allow the entire date (including the / separators) to be contained in this element.
6. Select the **Print** tab.
7. In the Label box, enter **Order Date:** to replace the existing text.
8. In the Maximum number of characters to be printed box, enter **8**.
9. Click **OK** to exit the dialog.
10. Click **Generate Layout** on the Main Toolbar to refresh the print form display.

## Results

The header frame now should look like this:



The screenshot shows a form header frame with the following fields and controls:

- Order Number: [Text Input]
- Order Date: [Text Input]
- Text Subject Qualifier:
- Free Text: [Text Input]
- Reference Qualifier:
- Reference Number: [Text Input]
- Payment Terms Type Qualifier:
- Terms Of Payment Identification: [Text Input]
- Terms Of Payment: [Text Input]
- Section Identification:
- Order Type: [Text Input]

---

## Customizing the FTX Segment

Your trading partner sends you messages or notes, so the FTX segment must be present to receive them. The standard allows the FTX segment to be used up to five times in one purchase order. In this tutorial, you will use the FTX segment only once. You have already changed the maximum use of the FTX segment to obtain just one instance of the FTX segment and to place the note or message on the same frame as the purchase order number and date.

### About this task

The FTX01 element (Text Subject Qualifier) is a mandatory element for the FTX segment. The FTX01 element contains the three-character qualifier from your partner's EDI data to indicate what type of free text follows (in this tutorial, AAI for General Information). The system does not enable you to deactivate this element, because it is a mandatory element. Because you expect only one qualifier (General Information) in this element, you do not need to print the qualifier on the report. You will hide the Text Subject Qualifier field.

The FTX06 element (Free Text) is mandatory when the FTX segment is used. The EDI data in the FTX06 element contains the exact message that should be printed. The message is self-explanatory so you do not need to print the label for this field. You need to remove the field label from the form. You also know that your partner sends free text in 60 characters or fewer (70 is the maximum length allowed by the standard for this field) so you need to change the element and field lengths for the Free Text field.

Use this procedure to customize the FTX segment.

### Procedure

1. To hide the Text Subject Qualifier field, double-click the **FTX01** element.
2. On the **Print** tab, clear the **Include this field in the print** check box.
3. Click **OK** to exit the dialog.
4. To customize the Free Text field, double-click the **FTX06** element.



5. On the **Validation** tab, enter **60** in the Maximum box to allow a 60-character string in this element.
6. Select the **Print** tab.
7. In the Label box, delete the existing text.
8. In the Maximum number of characters to be printed box, enter **60**.
9. Click **OK** to exit the dialog.
10. Click **Generate Layout** on the Main Toolbar to refresh the print form display.

## Results

The header frame now should look like this:

The screenshot shows a form layout with the following fields and labels:

- Order Number: [input box]
- Order Date: [input box]
- Reference Qualifier:
- Reference Number: [input box]
- Payment Terms Type Qualifier:
- Terms Of Payment Identification: [input box]
- Terms Of Payment: [input box]
- Section Identification:
- Order type: [input box]

## Customizing the RFF Group

The RFF segment is a conditional group that specifies the Reference information for the purchase order. The standard allows this group to be used up to 10 times in one purchase order. You need to use this group only once in the header of the purchase order (for the contract number) so you have already changed the maximum use of this group to one. At the same time, you promoted this group to the parent frame so that the contract number is displayed on the same frame as the purchase order number and date.

### About this task

The RFF segment (Reference) contains reference information used in the EDI data. In this tutorial, you know that the only reference number your partner will send you in the RFF segment is a contract number that your trading partner uses for their records.

The RFF01 element (Reference Qualifier) is a mandatory element for the RFF segment. The RFF01 element contains the three-character code from your partner's EDI data to indicate what type of reference follows. For this tutorial, you know that your trading partner sends you only one type of reference—the contract number. The system does not enable you to deactivate this element, because it is a mandatory element. Since you expect only one qualifier in this element, you do not need to print the qualifier on the report. You will hide the Reference Qualifier field.

The RFF02 element contains the Reference Number. This element is defined by the standard to be a string of 35 alphanumeric characters. In this tutorial, you know that your trading partner's reference number (the contract number) is a 12-character string so you need to change the field and element lengths to accommodate the reference number that is shorter than the standard expects. In addition, you need to rename the field label.

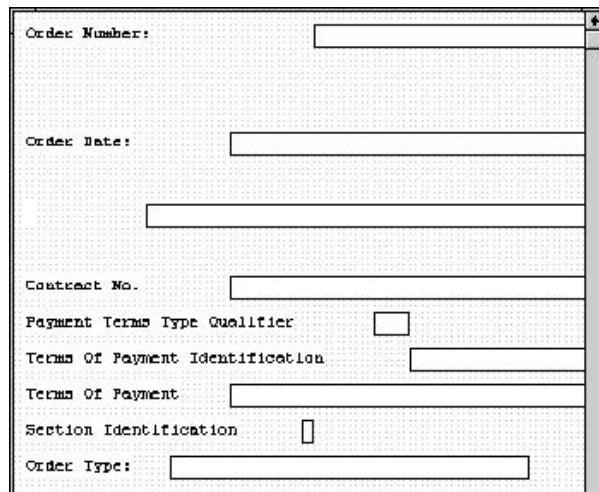
Use this procedure to customize the RFF group.

### Procedure

1. To hide the Reference Qualifier field, double-click the **RFF01** element.
2. Select the **Print** tab.
3. Clear the **Include this field in the print** check box.
4. Click **OK** to exit the dialog.
5. To customize the Reference Number field, double-click the **RFF02** element.
6. On the **Validation** tab, enter **12** in the Maximum box to allow a 12-character string in this element.
7. Select the **Print** tab.
8. In the Label box, enter **Contract No.** to replace the existing text.
9. In the Maximum number of characters to be printed box, enter **12**.
10. Click **OK** to exit the dialog.
11. Click **Generate Layout** on the Main Toolbar.

### Results

The header frame now should look like this:



The screenshot shows a form header frame with the following fields and labels:

- Order Number: [text box]
- Order Date: [text box]
- Contract No.: [text box]
- Payment Terms Type Qualifier: [checkbox]
- Terms Of Payment Identification: [text box]
- Terms Of Payment: [text box]
- Section Identification: [checkbox]
- Order Type: [text box]

---

## The NAD Group

The standard allows the NAD group (Name and Address) to be used up to 20 times. In the NAD group, you have already activated the NAD segment to contain the name and address of an entity or individual. Your trading partner uses the NAD group to send you these three types of addresses:

- Party to be billed (Party Qualifier AA)
- Buyer (Party Qualifier BY)

- Ship to (Party Qualifier ST)

The NAD segment identifies the Name and Address of an entity or individual. The NAD01 element is a mandatory element in the NAD segment and contains the three-character qualifier identifying the type of party in the NAD segment.

The NAD01 element (Party Qualifier) identifies the type of party in the NAD segment. For this tutorial, you know that your trading partner sends only these three types of names/addresses: Party to be billed, Buyer, and Ship to. You want the meaningful description of the qualifier on the printout instead of the qualifier itself.

To print the description of the EDI code value, you must copy the NAD01 element to another element in the NAD segment, then use the new NAD element to print the description of the Party Qualifier code.

## Copying the NAD01 Element

### About this task

Use this procedure to copy and paste the NAD01 element.

### Procedure

1. Select the **NAD01** element.
2. Click **Copy** on the Main Toolbar.
3. Select the **NAD22** element, which is the last element in the NAD segment.
4. Click **Paste** on the Main Toolbar to paste the new element.

## Changing the NAD23 Element and Field Properties

The system names the new element created from copying the NAD01 element 3035:3. You need to rename the new element to identify its purpose, which is to print the description of the qualifier from the NAD01 element. You need to remove the Mandatory status from the NAD23 element to make it a conditional element (meaning that the element will be used only if there is EDI data available for it) and increase the element and field lengths to accommodate the qualifier's description.

### About this task

Use this procedure to change the element name and length, make the element conditional instead of mandatory, and change the field label and field length for the Party Qualifier field.

### Procedure

1. Double-click the **NAD23** element.
2. In the Name box, enter **3035\_DESC**.
3. Select the **Validation** tab.
4. Clear the **Mandatory** check box to make the element conditional.

**Note:** You will not receive an NAD23 element from your trading partner. If you leave the mandatory status checked, you will receive a compliance error.

5. Enter **0** in the Min box and **18** in the Max box for the range of characters allowed for this element.

6. Select the **Print** tab.
7. In the Label box, delete the existing text.
8. In the Maximum number of characters to be printed box, enter **18**.
9. Click **OK** to exit the dialog.

## Hiding the NAD01 Field and Loading the Code List Table from the Standards

Now that you have created an exact copy of the NAD01 element, you can hide the first Party Qualifier field.

### About this task

For this tutorial, you know that your trading partner will send you the following types of names and addresses:

- Party to be billed (Party Qualifier AA)
- Buyer (Party Qualifier BY)
- Ship to (Party Qualifier ST)

You do not need to load the entire code list table; you will load only codes AA, BY, and ST from the code list table.

Use this procedure to hide the first Party Qualifier field and load the codes from the standards.

### Procedure

1. Double-click the **NAD01** element, which is the element for which you need to use a code list table.
2. On the **Print** tab, clear the **Include fields in the print** check box.
3. On the **Standard Rule** tab, select **Use Code** from the list. Click **Yes** at the prompt.
4. Click **Edit** to access the Edit Code List dialog.  
The Table ID box contains 3035, the name of the element for which this code list table will be used. The Desc box contains PARTY QUALIFIER, the description of the element for which this code list table will be used.
5. Click **Load** to access the Load Code List dialog. You are prompted to select an ODBC data source name. Select the appropriate DSN and click **OK** to access the Load Code List dialog. The Codes In Standard list contains the entire code list.
6. From the Codes In Standard list, highlight code **AA** and click **Add** to move it to the Codes Selected list. Highlight code **BY** and click **Add**. Highlight code **ST** and click **Add**.  
  
**Tip:** This code list table contains many codes. To access code ST quickly, press the letter **s**; the first code that begins with the letter **s** is highlighted. You need to scroll through only the list of codes beginning with **s**, instead of the entire code list, to access code ST.
7. Click **OK** to load the code list table and exit the Load Code List dialog.
8. Click **Close** to exit the Edit Code List dialog.
9. From the Store Field list, select **3035\_DESC PARTY QUALIFIER** to store the description in the NAD23 element you created.
10. Click **OK** to exit the dialog.

## Customizing the NAD10 Element

The NAD10 element (Party Name) contains the exact name that should be printed in the purchase order. The name is explained by the description of the Party Qualifier so you do not need to print the label associated with the name. The only customizing that is necessary for the NAD10 element is to remove the field label on the printout.

### About this task

Use this procedure to hide the Party Name field label.

### Procedure

1. Double-click the **NAD10** element.
2. On the **Print** tab, delete the text in the Label box. The party name is explained by the description in the Party Qualifier field (NAD23).
3. Click **OK** to exit the dialog.

## Customizing the NAD16 Element

The NAD16 element contains the Street and Number/P.O. Box, which identifies the street name and number, suite number, or any other address information that your trading partner sends you. The NAD16 element contains the exact address information that should be printed. The address information corresponds to the name that is printed from the NAD10 element. There is no need to print the label associated with the address so you need to remove the field label for the NAD16 element.

### About this task

Use this procedure to hide the field label for the first Street and Number/P.O. Box field.

### Procedure

1. Double-click the **NAD16** element.
2. On the **Print** tab, delete the text in the Label box.
3. Click **OK** to exit the dialog.

## Customizing the NAD17 Element

The NAD17 element contains the second Street and Number/P.O. Box line, which (like the NAD16 element) identifies the street name and number, suite number, or any other address information that your trading partner sends you. The NAD17 element contains the exact address information that should be printed. The address information corresponds to the name that is printed from the NAD10 element. There is no need to print the label associated with the address, so you need to remove the field label for the NAD17 element.

### About this task

Use this procedure to remove the field label for the second Street and Number/P.O. Box field.

## Procedure

1. Double-click the **NAD17** element.
2. On the **Print** tab, delete the text in the Label box.
3. Click **OK** to exit the dialog.

## Customizing the NAD19 Element

The NAD19 element contains the City Name. There is no need to print the field label associated with this element, because it will be evident on the printout that all the name and address information are associated. Therefore, you will remove the field label for the NAD19 element. Also, you must change the element and field lengths because you do not need the City Name field to be longer than 30 characters.

### About this task

Use this procedure to change the element and field lengths and remove the City Name field label.

## Procedure

1. Double-click the **NAD19** element.
2. On the **Validation** tab, enter **30** in the Maximum box to allow a 30-character string in this element.
3. Select the **Print** tab.
4. In the Label box, delete the existing text.
5. In the Maximum number of characters to be printed box, enter **30** to display a 30-character city name on the printout.
6. Click **OK** to exit the dialog.

## Customizing the NAD20 Element

The NAD20 element contains the Country Sub-Entity Identification. You do not need to print the field label associated with this element, because it is evident on the printout that all the name and address information are associated. You must remove the field label for the NAD20 element and change the element and field lengths because your partner sends a Country Sub-Entity Identification that is abbreviated to no more than two characters.

### About this task

Use this procedure to change the element and field lengths and remove the Country Sub-Entity Identification field label.

## Procedure

1. Double-click the **NAD20** element.
2. On the **Validation** tab, enter **2** in the Maximum box to allow a two-character string in this element.
3. Select the **Print** tab.
4. In the Label box, delete the existing text.
5. In the "Maximum number of characters to be printed" box, enter **2**.
6. Click **OK** to exit the dialog.

## Customizing the PO NAD21 Element

The NAD21 element contains the Postcode Identification. You do not need to print the field label associated with this element, because it is evident on the printout that all the name and address information are associated. You need to remove the field label for the NAD21 element.

### About this task

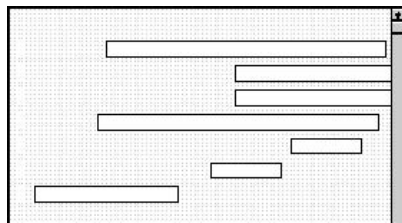
Use this procedure to remove the Postcode Identification field label.

### Procedure

1. Double-click the **NAD21** element.
2. On the **Print** tab, delete the text in the Label box.
3. Click **OK** to exit the dialog.
4. Click **Generate Layout** on the Main Toolbar to refresh the print form display.

### Results

The Name and Address (NAD) frame now should look like this:



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## The PAT Group

The PAT group is a conditional group that specifies the Payment Terms for the purchase order. The standard allows this group to be used up to 10 times in one purchase order. You need to use this group only once in the header of the purchase order so you changed the maximum use of this group to one. At the same time, you promoted this group to the parent frame so that the payment terms are displayed on the same frame as the purchase order number and date (the header frame).

The PAT segment is a conditional segment in the PAT group that specifies the Payment Terms Basis for the purchase order. You have already activated the PAT05 element for the Terms of Payment. The mandatory elements PAT01 (Payment Terms Type Qualifier) and PAT02 (Terms of Payment Identification) also are activated.

The PAT01 element is a mandatory element that contains the Payment Terms Type Qualifier, a three-character code that identifies the terms under which this purchase order is valid. You need to hide the PAT01 element and print the more meaningful description of the code in a new element that you create.

You know that your trading partner only sends you purchase orders with these terms:

- Previously Agreed Upon (Payment Terms Type Qualifier 18)
- Instant (Payment Terms Type Qualifier 10)

To print the description of an EDI code value, you must copy the PAT01 element to a new element in the PAT segment, then use the new PAT element to print the description of the Payment Terms Type Qualifier.

## **Copying the PAT01 Element**

### **About this task**

Use this procedure to copy and paste the PAT01 element.

### **Procedure**

1. Select the **PAT01** element.
2. Click **Copy** on the Main Toolbar.
3. Select the **PAT06** element, which is the last element in the C110 composite in the PAT segment.
4. Click **Paste** on the Main Toolbar to paste the new element. A new element (PAT07) is created, which is an exact copy of the PAT01 element.

## **Changing the PAT07 Element and Field Properties**

The system names the new element created from copying the PAT07 element 4279:2. You need to rename the new element to identify its purpose, which is to print the description of the code from the PAT01 element. Also, you need to increase the element and field lengths to accommodate the longer description.

### **About this task**

Use this procedure to change the element name and length and to change the field label and length for the Payment Terms Type Qualifier field.

### **Procedure**

1. Double-click the **PAT07** element.
2. In the Name box, enter **4279\_DESC** to give the name a more descriptive identifier than its current name.
3. Select the **Validation** tab.
4. Clear the **Mandatory** check box to make the element conditional.
5. Enter **0** in the Minimum box and **30** in the Maximum box.
6. Select the **Print** tab.
7. In the Label box, delete the existing text.
8. In the Maximum number of characters to be printed box, enter **30**.
9. Click **OK** to exit the dialog.

## **Hiding the PAT01 Field and Loading the Code List Table from the Standards**

Now that you have created an exact copy of the PAT01 element, you can hide the first Payment Terms Type Qualifier field.

### **About this task**

You know that your trading partner only sends purchase orders with these two term types:

- Previously agreed upon (Payment Terms Type Qualifier 18)



- Instant (Payment Terms Type Qualifier 10)

You do not need to load the entire code list table so load only codes 18 and 10 from the code list table.

Use this procedure to hide the first Terms Type Code field and load the codes from the standards.

### Procedure

1. Double-click the **PAT01** element, which is the element for which you need to use a code list table.
2. On the **Print** tab, clear the **Include this field in the print** check box.
3. On **Standard Rule** tab, select **Use Code** option. Click **Yes** at the prompt.
4. Click **Edit** to access the Edit Code List dialog.

**Note:** The Table ID box contains 4279, the name of the element for which this code list table is used. The Desc box contains PAYMENT TERMS TYPE QUALIFIER, the description of the element for which this code list table is used.

5. Click **Load** to access the Load Code List dialog.  
You are prompted to select an ODBC data source name.
6. Select the appropriate DSN and click **OK** to access the Load Code List dialog. The Codes In Standard list contains the entire code list.
7. From the Codes In Standard list, highlight code **10** and click **Add** to move it to the Codes Selected list. Then, highlight code **18** and click **Add**.
8. Click **OK** to load the code list table and exit the Load Code List dialog.
9. Click **Close** to exit the Edit Code List dialog.
10. From the Store Field list, select **4279\_DESC PAYMENT TERMS TYPE QUALIFIER** to store the code in the PAT07 element you created.
11. Click **OK** to exit the dialog.

## Customizing the PAT02 Element

The PAT02 element (Terms of Payment Identification) is a mandatory element for the PAT segment. You do not need to print the identification on the printout so you will hide the Terms of Payment Identification field.

### About this task

Use this procedure to hide the Terms of Payment Identification field.

### Procedure

1. Double-click the **PAT02** element.
2. On the **Print** tab, clear the **Include fields in the print** check box.
3. Click **OK** to exit the dialog.

## Customizing the PAT05 Element

The PAT05 element contains the exact terms of payment for the purchase order. The terms are explained by the description of the Payment Terms Type Qualifier so there is no need to print the label associated with the terms of payment. You need remove the field label for the PAT05 element on the printout.

## About this task

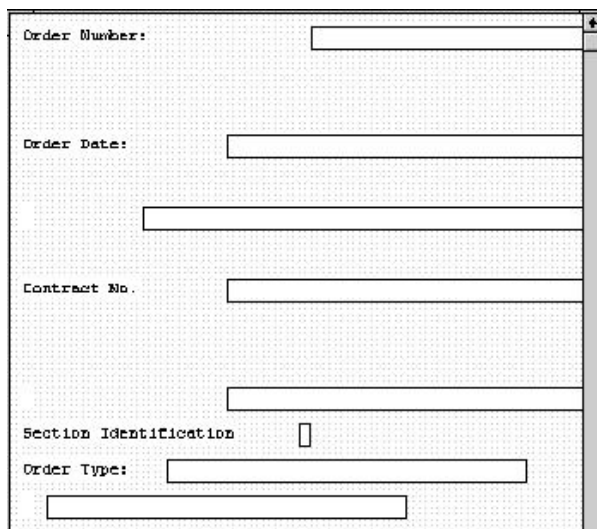
Use this procedure to remove the Terms of Payment field label.

### Procedure

1. Double-click the **PAT05** element.
2. On the **Print** tab, delete the text in the Label box.
3. Click **OK** to exit the dialog.
4. Click **Generate Layout** on the Main Toolbar to refresh the print form display.

### Results

The header frame now should look like this:



The screenshot shows a print form header frame with the following fields and labels:

- Order Number: [text box]
- Order Date: [text box]
- Contract No.: [text box]
- Section Identification: [checkbox]
- Order Type: [text box]

There are also several unlabeled text boxes and a vertical scrollbar on the right side of the form.

---

## The LIN Group

The standard allows the LIN group to be used up to 200,000 times, containing up to 200,000 line items in one purchase order. You have already activated these segments in the LIN group: LIN, PIA, IMD:2, MEA:3, QTY:3, DTM:13, and MOA:5. Also, you have already promoted the DTM:13 segment in the LIN group to create the DTM:27 segment.

### Before Customization

Before you customize the segments and elements in the LIN group, the fields in the form are arranged with one field on a line, like the following:

Line Item Number	<input type="text"/>
Product Id Function Qualifier	<input type="checkbox"/>
Item Number	<input type="text"/>
Item Description	<input type="text"/>
Measurement Application Qualifier	<input type="checkbox"/>
Measure Unit Qualifier	<input type="checkbox"/>
Measurement Value	<input type="text"/>
Quantity Qualifier	<input type="checkbox"/>
Quantity	<input type="text"/>
Date/time/period Qualifier	<input type="checkbox"/>
Date/time/period	<input type="text"/>
Date/time/period Qualifier	<input type="checkbox"/>
Date/time/period	<input type="text"/>
Monetary Amount Type Qualifier	<input type="checkbox"/>
Monetary Amount	<input type="text"/>

If the frame were not customized and formatted differently, each set of fields would be repeated for each item ordered. A more efficient and traditional way of listing items on a purchase order is to arrange the related information in columns so all the related information for one item is listed on one or two lines. The column headings are printed only once.

### After Customization

The following figure shows how you ultimately want the fields in the LIN group to be arranged (after customizing and formatting the fields).

Line No.	Prod ID	Code Type	Qty Ord	Unit	Price Each	Requested Ship Date	Ship No Later
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>							

## Customizing the LIN01 Element

The LIN segment (in the LIN group) contains the Line Item details for the items on the purchase order. Information in the LIN segment pertains to each line item on the purchase order and not to the entire purchase order.

### About this task

The LIN01 element contains the Line Item Number for one item on the purchase order. You need to rename the field label to reflect the new label that you and your trading partner have agreed to use. You and your trading partner have agreed that the line items per purchase order will not exceed 99,999. Since each line item is numbered sequentially, starting with one, you need a maximum length of only five digits for this field. Therefore, you need to change the maximum length for this field.

Use this procedure to change the element and field lengths and rename the field label for the Line Item Number field.

## Procedure

1. Double-click the **LIN01** element.
2. On the **Validation** tab, enter **5** in the Maximum box.
3. Select the **Print** tab.
4. In the Label box, enter **Line** to replace the existing text.

**Note:** The label for the Line Item Number field ultimately will form the column heading Line No. To make the width of the column heading as narrow as possible, you will place Line on one line and No. below. The Label field does not enable you to enter a label on more than one line, so you will enter Line in the Label box, then add No. by adding static text later in this tutorial. (Static text is text that is always printed or displayed when the form is used, and that is not defined in the field properties of the element.)

5. In the Maximum number of characters to be printed box, enter **5**.
6. Click **OK** to exit the dialog.

## Customizing the PIA Segment

The PIA segment in the LIN group contains the Additional Product ID details for the items on the purchase order. Information in the PIA segment pertains to each line item on the purchase order and not to the entire purchase order. The standard allows the PIA segment to be used up to 25 times for each line item, but you need the PIA segment to be used only once for each line item. You have already changed the maximum use of the PIA segment to one.

### About this task

The PIA01 element is a mandatory element that contains the Product ID Function Qualifier for each item on the purchase order. For brevity on the printout, you will rename the field label.

The PIA02 element contains the Item Number for one item on the purchase order. You need to rename the field label to more accurately identify this field for you and your trading partner. The standard allows up to a 35-character string in this field. Your trading partner uses product identification numbers that are no longer than 10 characters so you need to change the maximum length for this field to ten.

Use this procedure to customize the PIA segment.

## Procedure

1. To customize the Product ID Function Qualifier field, double-click the **PIA01** element.
2. On the **Print** tab, enter **Code** in the Label box to replace the existing text.

**Note:** The label for the Product ID Function Qualifier field ultimately will form the column heading Code Type. To make the width of the column heading as narrow as possible, you will place Code on one line and Type below. The Label field does not enable you to enter a label on more than one line, so you will enter Code in the Label box, then add Type by adding static text later in this tutorial.

3. Click **OK** to exit the dialog.
4. To customize the Item Number field, double-click the **PIA02** element.
5. On the **Validation** tab, enter **10** in the Maximum box to allow a 10-character string for the product identification number in this element.

6. Select the **Print** tab.
7. In the Label box, enter **Prod ID** to replace the existing text.
8. In the Maximum number of characters to be printed box, enter **10**.
9. Click **OK** to exit the dialog.

## Customizing the IMD:206 Element

The IMD:2 segment (in the LIN group) contains the Item Description for the items on the purchase order. Information in the IMD:2 segment pertains to each line item on the purchase order and not to the entire purchase order. The standard allows the IMD:2 segment to be used up to 10 times for each line item, but you need the IMD:2 segment to be used only once for each line item. You have already changed the maximum use of the IMD:2 segment to one.

### About this task

The IMD:206 element contains the Item Description for the purchase order item. The description is self-explanatory so there is no need to print the field label associated with the description.

Use this procedure to remove the Item Description field label.

### Procedure

1. Double-click the **IMD:206** element.
2. Select the **Print** tab.
3. In the Label box, delete the existing field label.
4. Click **OK** to exit the dialog.

## Customizing the MEA:3 Segment

The MEA:3 segment (in the LIN group) contains the Measurements for the items on the purchase order. Information in the MEA:3 segment pertains to each line item on the purchase order and not to the entire purchase order. The standard allows the MEA:3 segment to be used up to five times for each line item, but you need the MEA:3 segment to be used only once for each line item. You have already changed the maximum use of the MEA:3 segment to one.

### About this task

The MEA:301 element is a mandatory element that contains the Measurement Application Qualifier for each item on the purchase order. This element must be present in the purchase order, but you do not need this qualifier to be printed.

The MEA:305 element is a mandatory element that contains the Measure Unit Qualifier for each item on the purchase order. This element must be present in the purchase order. You do not need this qualifier to be printed on the printout so you need to prevent this field from being displayed on the printout.

The MEA:306 element contains the Measurement Value for each item on the purchase order. For brevity, you will rename the field label. The standard allows up to an 18-digit number in this field. You expect a number no longer than two digits from your trading partner so you need to change the maximum length for this field accordingly. Also, the screen format and EDI format of the data currently use the number format R9, which indicates a number with an explicit decimal point and up to nine decimal places. You do not expect any decimal places from

your partner's data, so you need to change the screen format and EDI format to R0, which indicates a number with an explicit decimal point and no decimal places.

Use this procedure to customize the MEA:3 segment.

### Procedure

1. To customize the Measurement Application Qualifier field, double-click the **MEA:301** element.
2. On the **Print** tab, clear the **Include field in the print** check box.
3. Click **OK** to exit the dialog.
4. To customize the Measure Unit Qualifier field, double-click the **MEA:305** element.
5. On the **Print** tab, clear the **Include field in the print** check box.
6. Click **OK** to exit the Display Properties dialog.
7. To customize the Measurement Value field, double-click the **MEA:306** element.
8. Select the **Validation** tab.
9. In the Maximum box, enter **2** to allow a two-digit number in this element.
10. From the Format of the data in the form list, select **R0** to allow a number with an explicit decimal point and no decimal places to be displayed on the printout.
11. Click **Yes** at the prompt.
12. From the Format of the data of the file list, select **R0** to indicate that you expect a number with an explicit decimal point and no decimal places.
13. Click **Yes** at the prompt.
14. Select the **Print** tab.
15. In the Label box, enter **Unit** to replace the existing text.
16. In the Maximum number of characters to be printed box, enter **2**.
17. Click **OK** to exit the dialog.

## Customizing the QTY:3 Segment

The QTY:3 segment in the LIN group contains the Quantity details for the items on the purchase order. Information in the QTY:3 segment pertains to each line item on the purchase order and not to the entire purchase order. The standard allows the QTY:3 segment to be used up to 10 times for each line item but you need the QTY:3 segment to be used only once for each line item. You have already changed the maximum use of the QTY:3 segment to one.

### About this task

The QTY:301 element is a mandatory element that contains the Quantity Qualifier for each item on the purchase order. This element must be present in the purchase order, but you do not need this qualifier to be printed so you need to prevent this field from being displayed on the printout.

The QTY:302 element contains the Quantity for one item on the purchase order. You need to abbreviate the field label on the printout. The standard allows up to a 15-digit number in this field. You know that your trading partner will order no more than 99,999 (a five-digit number) of any one item so you need to change the maximum length to six for this field (to accommodate a five-digit number and a

place separator) and change the value in the Screen Format and EDI Format lists to N0, which indicates a number with an implied decimal point and no decimal places.

Use this procedure to customize the QTY:3 segment.

### Procedure

1. To customize the Quantity Qualifier field, double-click the **QTY:301** element.
2. On the **Print** tab, clear the **Include fields in the the print** check box.
3. Click **OK** to exit the dialog.
4. To customize the Quantity field, double-click the **QTY:302** element.
5. Select the **Validation** tab.
6. In the Maximum box, enter **6** to allow a five-digit number with a place separator in this element.
7. From the Format of the data in the form list, select **N0** to allow a number with an implicit decimal point and no decimal places to be displayed on the printout.
8. From the Format of the data of the file list, select **N0** to indicate that you expect a number with an implicit decimal point and no decimal places.
9. Select the **Print** tab.
10. In the Label box, enter **Qty**.
11. In the Maximum number of characters to be printed box, enter **6**.
12. Click **OK** to exit the dialog.

## Customizing the DTM:27 Segment

The DTM:27 segment (in the LIN group) is used to print the required shipment date. To ensure that Sterling Gentrans:Server prints the correct date in the Date/Time/Period field, you must use the key field function. The key field function enables you to specify a second qualification in selecting a segment (the segment name is the first qualification). Data must be provided in the order designated through the use of key fields. For example, for this tutorial, you expect the required shipment date (DTM:27) first, and then the last delivery date (DTM:13).

### About this task

**Note:** The dates printed in the DTM:27 and DTM:13 segments can be set up using key fields because you expect the dates in a particular order. If the dates were sent in a different order, only one date would be printed. If you were not sure of the order in which your partner will send the dates, you could not use key fields. You would need to use three DTM segments (using the promote function), and two of those DTM segments would need to be identical.

When the Date/Time/Period Qualifier field contains the value 10 (required shipment date), the date is printed in the Date/Time/Period field of the DTM:27 segment. If the Date/Time/Period Qualifier field contains the value 128 (last delivery date), then the date is printed in the Date/Time/Period field of the DTM:13 segment.

The DTM:2701 element (in the DTM:27 segment) contains the Date/Time/Period Qualifier for the date in the DTM:2702 element. Your trading partner sends two types of dates: the required shipment date and the last delivery date (in that

order). You used the key field function for the DTM:27 segment to indicate to Sterling Gentran:Server that only the required shipment date are printed in the Date/Time/Period field (DTM:2702) so you can prevent the qualifier (DTM:2701) from being printed. The last delivery date is printed in the Date/Time/Period field for the DTM:13 segment.

The DTM:2702 element contains the Date/Time/Period corresponding to the date qualifier in the DTM:2701 element. The DTM:2702 element is used to designate when the shipment is required.

In this section of the tutorial, you need to rename the label for this field (the new label is named Requested). You need to add the words Ship Date using static text. Static text is text that is always printed when the form is used. It is not defined in the field properties of the element so that Ship Date is displayed on the line below Requested. The full field label is Requested Ship Date.

Use this procedure to customize the DTM:27 segment.

### Procedure

1. Right-click the **DTM:27** segment and select **Properties**.
2. Select the **Key Field** tab.
3. From the Field list, select **2005:3 DATE/TIME/PERIOD QUALIFIER**.
4. Click **Edit** to access the Map Constants dialog.
5. Click **New** to display the Edit Constant dialog.
6. In the ID box, enter **Shipment date/time, req** to identify the unique literal constant.
7. From the Type list, select **String**.
8. In the Value box, enter **10** to identify the actual value of the constant.
9. Click **OK** to exit the Edit Constant dialog.
10. Click **Close** to exit the Map Constants dialog.
11. From the Use constant list, select **10** to indicate to the system that this date is the required shipment date.
12. Click **OK** to exit the dialog.
13. To customize the Date/Time/Period Qualifier field, double-click the **DTM:2701** element.
14. On the **Print** tab, clear the **Include field in the print** check box.
15. Click **OK** to exit the dialog.
16. To customize the Date/Time/Period field, double-click the **DTM:2702** element.
17. On the **Validation** tab, enter **8** in the Maximum box to allow the entire date (including the / separator) in this element.
18. Select the **Print** tab.
19. In the Label box, enter **Requested** to replace the existing text.  
  
**Note:** You will enter Ship Date on a separate line later in this tutorial.
20. In the Maximum number of characters to be printed box, enter **8**.
21. Click **OK** to exit the dialog.

## Customizing the DTM:13 Segment

The DTM:13 segment (in the LIN group) is used to print the last delivery date (the latest date the order may be delivered). To ensure that Sterling Gentran:Server



prints the correct date in the Date/Time/Period field, you must use the key field function. The key field function enables you to specify a second qualification in selecting a segment. The segment name is the first qualification. Data must be provided in the order designated through the use of key fields. For example, for this tutorial, you expect the required shipment date (DTM:27) first, and then the last delivery date (DTM:13).

## About this task

For this tutorial, if the Date/Time/Period Qualifier field contains the value 10 (required shipment date), then the date is printed in the Date/Time/Period field of the DTM:27 segment. If the Date/Time/Period Qualifier field contains the value 128 (last delivery date), then the date is printed in the Date/Time/Period field of the DTM:13 segment.

The DTM:1301 element (in the DTM:13 segment) contains the Date/Time/Period Qualifier for the date in the DTM:1302 element. Your trading partner sends you two types of dates: the required shipment date and the last delivery date (in that order). You used the key field function for the DTM:13 segment to indicate to Sterling Gentran:Server that the last delivery date is printed in the Date/Time/Period field (DTM:1302). The DTM:1301 element must be present, but you can prevent this field from being displayed, since the meaningful information for a printout is the date itself.

The DTM:1302 element contains the Date/Time/Period corresponding to the date qualifier in the DTM:1301 element. The DTM:1302 element is used to designate the last delivery date that shipments can be shipped.

You need to rename the label for this field (the new label will be named Ship No). You need to add Later further in this tutorial using static text so that Later is displayed on the line below Ship No. The full field label will be Ship No Later.

Use this procedure to customize the DTM:13 segment.

## Procedure

1. Right-click the **DTM:13** segment and select **Properties**.
2. Select the **Key Field** tab.
3. From the Field list, select **2005 DATE/TIME/PERIOD QUALIFIER**.
4. Verify that the **Use constant** option is selected.
5. Click **Edit** to display the Map Constants dialog.
6. Click **New** to display the Edit Constant dialog.
7. In the ID box, enter **Delivery date/time, last**.
8. From the Type list, select **String**.
9. In the Value box, enter **128** to identify the actual value of the constant.
10. Click **OK** to exit the Edit Constant dialog.
11. Click **Close** to exit the Map Constants dialog.
12. From the Use constant list, select **128** to indicate to the system that this date is the last delivery date.
13. Click **OK** to exit the Key Field dialog.
14. To hide the second Date/Time/Period Qualifier field, double-click the **DTM:1301** element.
15. On the **Print** tab, clear the **Include fields in the print** check box.

16. Click **OK** to exit the dialog.
17. To customize the second Date/Time/Period field, double-click the **DTM:1302** element.
18. On the **Validation** tab, enter **8** in the Maximum box to allow the entire date (including the / separator) in this element.
19. Select the **Print** tab.
20. In the Label box, enter **Ship No** to replace the existing text.  
  
**Note:** You will enter Ship No on a separate line later in this tutorial.
21. In the Maximum number of characters to be printed box, enter **8**.
22. Click **OK** to exit the dialog.

## Customizing the MOA:5 Segment

The MOA:5 segment contains the Monetary Amount for the items on the purchase order. Information in the MOA:5 segment pertains to each line item on the purchase order, and not to the entire purchase order. The standard allows the MOA:5 segment to be used up to five times for each line item but you need the MOA:5 segment to be used only once for each line item. You have already changed the maximum use of the MOA:5 segment to one.

### Before you begin

The MOA:501 element is a mandatory element that contains the Monetary Amount Type Qualifier for the purchase order. This element must be present in the purchase order when the MOA:5 segment is activated. You do not need this qualifier to be printed on the printout. You must prevent this field from being displayed on the printout.

The MOA:502 element contains the Monetary Amount for the purchase order. You need to rename the field label on the printout. The standard allows up to 18 digits in this field. You know that your trading partner orders items totaling no more than \$999,999 (a six-digit number), so you need to change the maximum length to eight for this field (to accommodate a six-digit number, a place separator, and a plus or minus sign) and change the value in the Screen Format and EDI Format lists to **R2**, which indicates a number with an explicit decimal point and two decimal places.

Use this procedure to hide the .

### About this task

After customization

### Procedure

1. To hide the Monetary Amount Type Qualifier field, double-click the **MOA:501** element.
2. On the **Print** tab, clear the **Include fields in the print** check box.
3. Click **OK** to exit the dialog.
4. To customize the Monetary Amount field, double-click the **MOA:502** element.
5. On the **Validation** tab, enter **8** in the Maximum box to allow the entire date (including the / separator) in this element.
6. From the Format of the data in the form list, select **R2**.

7. From the Format of the data in the file list, select **R2** to indicate that you expect a number with an explicit decimal point and up to two decimal places.
8. Select the **Print** tab.
9. In the Label box, enter **Price**.
10. In the Maximum number of characters to be printed box, enter **8**.
11. Click **OK** to exit the dialog.
12. Click **Generate Layout** on the Main Toolbar to refresh the print form display.

## Results

The Line Item (LIN) frame now should look like this:

The screenshot shows a form titled 'Line Item (LIN)' with the following fields and their corresponding input boxes:

- Line**: A small rectangular input box.
- Code**: A small rectangular input box.
- Prod ID**: A long horizontal rectangular input box.
- Unit**: A rectangular input box.
- Qty**: A rectangular input box.
- Requested**: A long horizontal rectangular input box.
- Ship No**: A long horizontal rectangular input box.
- Price**: A rectangular input box.

---

## Customizing the PO UNS Segment

The UNS segment is a mandatory segment that contains the Section Control summary information for the purchase order. This segment identifies summary information that is pertinent to the entire purchase order.

### About this task

The UNS01 element is a mandatory element that contains the Section Identification for the purchase order. This element must be present in the purchase order, but you do not need this field to be printed on the printout.

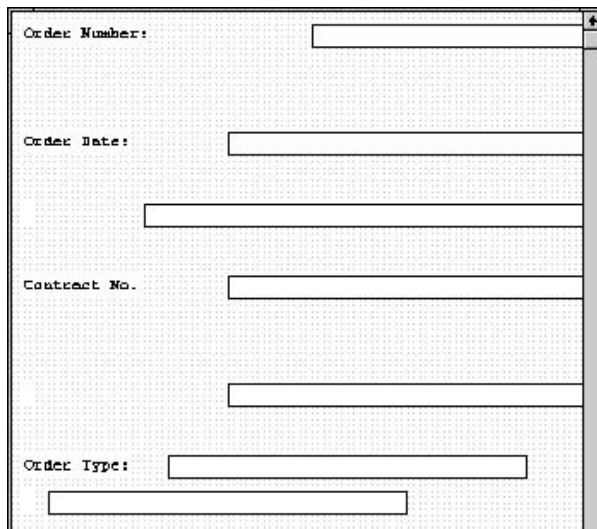
Use this procedure to hide the Section Identification field.

### Procedure

1. Double-click the **UNS01** element.
2. On the **Print** tab, clear the **Include fields in the print** check box.
3. Click **OK** to exit the dialog.
4. Click **Generate Layout** on the Main Toolbar.

## Results

The header frame now should look like this:



The screenshot shows a header frame with a dotted background. It contains several input fields: 'Order Number:' with a single-line text box; 'Order Date:' with a date picker; 'Contract No.' with a single-line text box; and 'Order Type:' with a single-line text box. There are also two additional empty single-line text boxes below the 'Order Type:' label. A vertical scrollbar is visible on the right side of the frame.

---

## Customizing the CNT Segment

The CNT segment (in the CNT group) contains the Control Total summary information for the purchase order. This segment identifies summary information that is pertinent to the entire purchase order. You expect to use this segment only once, so you have already changed the maximum use of the CNT segment to one.

### About this task

The CNT01 element is a mandatory element that contains the Control Qualifier for the purchase order. This element must be present in the purchase order when the CNT segment is used. You do not need this qualifier to be printed so you need to prevent this field from being displayed on the printout.

The CNT02 element contains the Control Value (the total number of line items) for the purchase order. You need to rename the field label on the printout to more clearly identify the contents of the field. The standard allows up to an 18-digit number in this field. You know that your trading partner will order no more than 99,999 (a five-digit number) items so you will change the maximum length to six for this field. You also need to change the value in the Screen Format and EDI Format lists to N0, which indicates a number with an implicit decimal point and no decimal places.

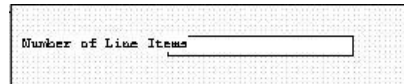
Use this procedure to customize the CNT segment.

### Procedure

1. To hide the Control Qualifier field, double-click the **CNT01** element.
2. On the **Print** tab, clear the **Include this field in the print** check box.
3. Click **OK** to exit the dialog.
4. To customize the Control Value field, double-click the **CNT02** element.
5. Select the **Validation** tab.
6. In the Maximum box, enter **6** for the maximum number of digits allowed.

7. From the Format of the data in the form list, select **N0**.
8. From the Format of the data in the file list, select **N0**.
9. Select the **Print** tab.
10. In the Label box, enter **Number of Line Items**.
11. In the Maximum number of characters to be printed box, enter **6** to allow five digits and a place separator on the printout.
12. Click **OK** to exit the dialog.
13. Click **Generate Layout** on the Main Toolbar.

The Control Total (CNT) frame now should look like this:



The image shows a rectangular frame with a dotted background. Inside the frame, the text "Number of Line Items" is displayed on the left side. To the right of this text is a small, empty rectangular input field.

14. Click **Save** from the File menu to save the form.



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## Chapter 8. Formatting the Print Form for EDIFACT

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### About Formatting the Print Form

In the previous section of this tutorial, you customized the print form for a purchase order that you will use to print the data you receive from Pet Zone. After successfully customizing the fields and elements of the print form, you are ready to format the layout of the form.

One form can consist of several frames. Each group and repeating segment has a corresponding frame that contains all the groups, segments, and elements at that level. When the form is printed, the frames are printed consecutively, in the order in which they occur in the form. Each frame is not printed on a separate page.

---

### Resizing the Header Frame

When a printout is produced based on the customized print form, the information is arranged according to how the frames and the fields contained in them were arranged when the form was compiled. You should eliminate unnecessary space as you arrange the fields on each frame.

#### About this task

Use this procedure to resize the header frame.

#### Procedure

1. Click one of the following segments segment to display the Beginning Segment for Purchase Order (header) frame in the Layout Window.
  - **BEG** (for ANSI X12)
  - **BGM** (for EDIFACT)
  - **ORDHDR** (for TRADACOMS)
2. To display more of the form on your screen, click and drag the center bar between the EDI File Format Window and the Layout Window to the left until the Layout Window is wide enough to display as much of the form as you want.
3. To resize the header frame, click and drag the right side of the frame approximately to the 20 cm. mark on the horizontal ruler (a form with a width of 20 cm. can be printed on an 8 1/2" x 11" or A4 sheet of paper).

---

### Adding a Title to the Form

You want the form to have a title designating the standard agency, version, type of document/message, and the trading partner for which this form is used. You add a title to the print form by adding static text.

#### About this task

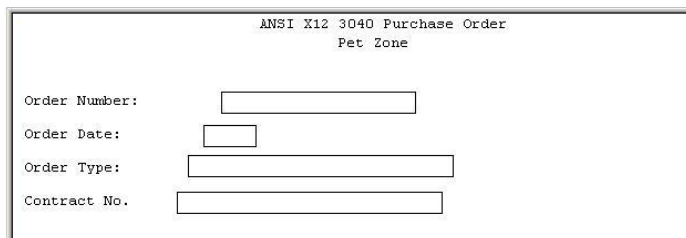
Use this procedure to add and position the title for the form and center it.

## Procedure

1. Select all the fields and field labels on the frame. Drag your selection approximately two or three centimeters lower on the frame to make room at the top of the frame for the title.
2. Click **Add Text** on the Main Toolbar.  
A text box is added to the current frame, displayed in the upper left corner of the frame.
3. In the new selected text box, enter one of the following and click **OK**.
  - **ANSI X12 3040 Purchase Order**
  - **EDIFACT 92.1 Purchase Order**
  - **TRADACOMS ANA001 ORDERS Release 9**
4. Click **Add Text** on the Main Toolbar. Enter **Pet Zone** and click **OK**.
5. Click and drag the first line of static text so that the text is centered on the first line of the frame.
6. Click and drag the second line of static text (**Pet Zone**) so that the text is centered on the second line of the frame.

## Results

The header frame should look similar to the following. (This is an ANSI X12 example; some details may be different for EDIFACT and TRADACOMS.)



ANSI X12 3040 Purchase Order  
Pet Zone

Order Number:

Order Date:

Order Type:

Contract No.

---

## Header Fields

By default, each field and its associated label are printed on their own line. However, it is common for purchase orders and forms to arrange some fields in columns of information.

The first fields you will rearrange are the header fields. For ANSI X12, these fields are associated with the BEG and REF segments. For EDIFACT, these fields are associated with the BGM, DTM, and FTX segments, and the RFF and PAT groups. For TRADACOMS, these fields are associated with the ORDHDR group and the CLO, ORD, and DIN segments.

You prevented some of the field labels from being printed (by removing the field label in the Label box of the Print dialog). For these fields, the fields are displayed on your print form, but their associated labels are not.

## Resizing the Header Fields

When you customized the element properties in the previous section of this tutorial, you changed the display lengths for some of the fields on the header frame. The fields that are displayed in the Layout Window currently reflect the



default display lengths for the fields. To reflect the new sizes of the fields in the Layout Window, you must select the fields for which you changed the display lengths, then resize the fields.

### About this task

Use this procedure to resize the fields on the header frame.

### Procedure

1. Select all the fields on the header frame. (For TRADACOMS, these are the **Latest Delivery Date** and **Order Date** fields.)
2. Select **Display > Size to Length**. The selected fields are resized to the lengths specified in the Maximum number of characters box of the Print dialog for each field.

## Moving Header Fields and Labels - EDIFACT

### About this task

Use this procedure to move and align the fields and field labels on the header frame.

### Procedure

1. Select each field individually and drag it closer to its respective field label.  
  
**Important:** Do not move fields that are not labeled.
2. Drag the **Order Date** label and field to the right of the Order Number label and field (at approximately 11.5 cm. on the horizontal ruler).
3. Drag the **Order Type** label and field below the Order Number label and field.
4. Drag the **Contract No.** label and field below the Order Date label and field.
5. Drag the **Free Text** field below the Order Type label and field.
6. Drag the **Payment Terms Type Qualifier** field below the Free Text field.
7. Drag the **Terms of Payment** field to the right of the Payment Terms Type Qualifier field.
8. Select the following items and select **Display > Align Controls > Left**.
  - Order Number field label
  - Order Type field label
  - Free Text field
  - Payment Terms Type Qualifier field
9. Select the **Order Type** and **Order Number** fields (in that order) and select **Display > Align Controls > Left**.
10. Select the **Order Date** and **Contract No.** field labels and select **Display > Align Controls > Left**.
11. Select the **Order Date** and **Contract No.** fields (in that order) and select **Display > Align Controls > Left**.
12. Select the **Order Number** and **Order Date** labels and fields and select **Display > Align Controls > Top**.
13. Select the **Order Type** and **Contract No.** labels and fields and select **Display > Align Controls > Top**.
14. Select the **Payment Terms Type Qualifier** and **Terms of Payment** fields and select **Display > Align Controls > Top**.

## Results

The header frame now should look like this:

EDI FACT 92, 1 PURCHASE ORDER			
Part Zone			
Order Number:	<input type="text"/>	Order Date:	<input type="text"/>
Order Type:	<input type="text"/>	Contract No.	<input type="text"/>
<input type="text"/>		<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

---

## Chapter 9. Creating Print Forms for TRADACOMS

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### Promoting the ORDHDR Group to the Parent Frame

The Promote function extracts one iteration (instance) of a group or repeating segment. Promote is a specialized function that preserves the integrity of the EDI structure.

#### About this task

By default, the fields corresponding to each group and repeating segment are displayed on a separate frame from the rest of the fields in the message. When you promote a group to the parent frame, the fields corresponding to the group are displayed on the frame to which the group is subordinate. If you do not promote a group to the parent frame, the fields corresponding to the group are displayed on their own frame.

Use this procedure to promote the ORDHDR group to the parent frame.

#### Procedure

1. Right-click the **ORDHDR** group and select **Properties**.
2. Select the **Print** tab.
3. Click the **Promote group to parent frame** check box to display the fields in this group on the same frame as the fields in the parent group.
4. Click **OK** to exit the Group Properties dialog.

---

### The OTR Group

The OTR segment contains Order Trailer summary information for the purchase order. If the form were generated now (displaying the layout of the fields in the form on the right side of the Forms main window), the total number of line items would be printed along with the ORDHDR fields at the beginning of the purchase order (because the fields in the OTR segment would be displayed on the same frame as the fields in the ORDHDR group).

To print the total number of line items at the end of the printout and maintain the integrity of the purchase order, you must create an OTR group with a minimum use and a maximum use of one, then cut the OTR segment and paste it as a subordinate to the group you just created. By moving the OTR segment to the new OTR group that you create, the total number of line items will be displayed on its own frame, separate from the header (ORDHDR) information.

### Creating an OTR Group

#### About this task

Use this procedure to create an OTR group.

#### Procedure

1. Select the **OTR** segment.
2. Select **Edit > Insert > Group**.
3. In the Name field, enter **OTR\_Group** as the segment loop identification code.

4. In the Desc field, enter **OTR Group** to provide a brief explanation of the loop.
5. On the **Looping** tab, enter **1** in the Min Usage field to make this group mandatory.
6. Click **OK** to create the group. Sterling Gentran:Server prompts you that the frame caption for the group will default to the name of the group.
7. Click **OK** to accept the message.

## **Cutting and Pasting the OTR Segment**

### **About this task**

Use this procedure to cut and paste the OTR segment.

### **Procedure**

1. Verify that the **OTR** segment is selected.
2. Click **Cut** on the Main Toolbar.
3. Select the **OTR** group, which is the group for which you want to paste the OTR segment as a subordinate.
4. Click **Paste** on the Main Toolbar to paste the OTR segment.
5. Accept the default to paste the Clipboard contents as a child (subordinate) of the group. Click **OK** to exit the dialog.

---

## Chapter 10. Modifying Form Components for TRADACOMS

---

### Setting up the Document Name for the Print Form

#### About this task

We recommend that you set up a Document Name for each form. The document name makes the identification of a document created by the form easier in Sterling Gentran:Server. Setting up the document name enables you to differentiate between documents in the document browsers. If you set up the document name in the Forms Integration subsystem, the Name field of the document browsers that contain this document in Sterling Gentran:Server contains the data from that element. You can choose any element as the document name, but we strongly recommend that you select an element that occurs only once in the document and has a data type of string. For an ANSI X12 850 purchase order, the document name usually is the Purchase Order Number. For an EDIFACT 92.1 purchase order, the document name usually is the Document/Message Number. For a TRADACOMS ANA001 ORDERS release 9 purchase order, the document name usually is the Customer's Order Number.

Use this procedure to set up the document name.

#### Procedure

1. Double-click one of the following elements:
  - **BEG03** (ANSI X12)
  - **BGM05** (EDIFACT)
  - **ORD ORNO ORNO** (TRADACOMS)

We recommend that you select this element because it is a non-recurring, mandatory element.

The Element Properties dialog is displayed.

2. Select the **Standard Rule** tab.
3. Select the **Update** from the standard rule list.
4. Click **Yes** at the prompt.
5. From the Select the table (or group) to update list, select **Document record**.
6. From the Column (or field) to update list, select **Document Name** to indicate that you are updating the Name field in the document browsers with the contents of the element.
7. Click **OK** to set up the document name.

---

### The ORDHDR Group

The ORDHDR group (Order File Header) is used to print the header details pertaining to the ORDERS message. You already promoted this group to the parent frame (the ORDERS file).

---

### Customizing the TYP Segment

The TYP segment (Transaction Type Details) contains the transaction code for this message.

## About this task

The TYP CD02 element (Transaction Code) is a mandatory element that contains the code for the type of orders that follow (such as new orders or cancelled orders). You do not need to print the code on the printout, so you will hide the Transaction Code field.

Use this procedure to prevent the Transaction Code field from being printed.

### Procedure

1. Double-click the **TYP CD02** element.
2. On the **Print** tab, clear the **Include in print** check box to turn the option off.
3. Click **OK** to exit the dialog.

---

## Customizing the SDT Segment

The SDT segment (Supplier Details) contains details about the supplier. In this tutorial, the supplier is your company, MWT Manufacturing Co.

### About this task

The SDT SIDN SID0 element (Supplier's ANA Location Code) contains the code assigned by the Article Numbering Association for the supplier's location. Your trading partner will send you this code, but you do not need the code to be printed on the printout. Therefore, you will hide this field.

The SDT SNAM element (Supplier's Name) contains the name of the supplier (in this tutorial, you are the supplier). Your trading partner will send you this name, but you do not need the name to be printed on the printout. (All purchase orders you receive from customers should have your company designated as the supplier.) Therefore, you will hide this field.

Use this procedure to customize the SDT segment.

### Procedure

1. To hide the Supplier's ANA Location Code field, double-click the **SDT SIDN SID0** element.
2. On the **Print** tab, clear the **Include in print** check box to turn the option off.
3. Click **OK** to exit the dialog.
4. To hide the Supplier's Name field, double-click the **SDT SNAM** element.
5. On the **Print** tab, clear the **Include in print** check box to turn the option off.
6. Click **OK** to exit the dialog.

---

## Customizing the CDT Segment

The CDT segment (Customer Details) contains details about the customer (your trading partner, Pet Zone). In this tutorial, the CDT segment contains details relating to the Pet Zone corporate office.

### About this task

The CDT CIDN CID0 element (Customer's ANA Identity/Loc) contains the code assigned by the Article Numbering Association for the customer's location. Your

trading partner will send you this code, but you do not need the code to be on the printout. Therefore, you will hide this field.

The CDT CNAM element contains the Customer's Name. For brevity, you will change the field label to Customer.

The elements CDT CADD CAD0, CDT CADD CAD1, CDT CADD CAD2, and CDT CADD CAD3 contain four lines of the customer's address. The CDT CADD CAD4 element contains the post code of the customer's address. The address will correspond to the name in the CDT CNAM element, so you do not need to print a label for the address fields.

Use this procedure to customize the CDT segment.

### Procedure

1. To hide the Customer's ANA Identity/Loc field, do the following:
  - Double-click the **CDT CIDN CID0** element.
  - On the **Print** tab, clear the **Include in print** check box to turn the option off.
  - Click **OK** to exit the dialog.
2. To change the field label for the Customer's Name field, do the following:
  - Double-click the **CDT CNAM** element.
  - On the **Print** tab, enter **Customer:** in the Label field to replace the existing text.
  - Click **OK** to exit the dialog.
3. To remove the field label for the Customer's Address Line 1 field, do the following:
  - Double-click the **CDT CADD CAD0** element.
  - On the **Print** tab, delete the existing text in the Label field.
  - Click **OK** to exit the dialog.
4. To remove the field label for the Customer's Address Line 2 field, do the following:
  - Double-click the **CDT CADD CAD1** element.
  - On the **Print** tab, delete the existing text in the Label field.
  - Click **OK** to exit the dialog.
5. To remove the field label for the Customer's Address Line 3 field, do the following:
  - Double-click the **CDT CADD CAD2** element.
  - On the **Print** tab, delete the existing text in the Label field.
  - Click **OK** to exit the dialog.
6. To remove the field label for the Customer's Address Line 4 field, do the following:
  - Double-click the **CDT CADD CAD3** element.
  - On the **Print** tab, delete the existing text in the Label field.
  - Click **OK** to exit the dialog.
7. To remove the field label for the Customer's Post Code field, do the following:
  - Double-click the **CDT CADD CAD4** element.
  - On the **Print** tab, delete the existing text in the Label field.
  - Click **OK** to exit the dialog.

---

## Customizing the FIL Segment

The FIL segment (File Details) contains details about the ORDHDR message. These elements must be present in the ORDHDR message, but you do not need to print them on a printout.

### About this task

The FIL FLGN element (File Generation Number) contains the sequential number assigned to this message by your trading partner. Your trading partner will send you this number, but you do not need the number to be printed on the printout. Therefore, you will hide this field.

The FIL FLVN element (File Version Number) contains the number corresponding to this version of the message. The first version of the message is always version one, and subsequent copies of the message are incremented by one. Your trading partner will send you this number, but you do not need the number to be printed on the printout. Therefore, you will hide this field.

The FIL FLDT element (File Creation Date) contains the date on which the message was created. Your trading partner will send you this date, but you do not need the date to be printed on the printout. Therefore, you will hide this field.

Use this procedure to customize the FIL segment.

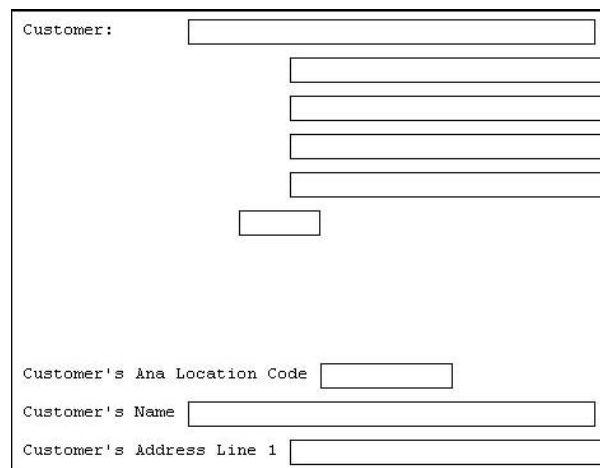
### Procedure

1. To hide the File Generation Number field, double-click the **FIL FLGN** element.
2. On the **Print** tab, clear the **Include in print** check box to turn the option off.
3. Click **OK** to exit the dialog.
4. To hide the File Version Number field, double-click the **FIL FLVN** element.
5. On the **Print** tab, clear the **Include in print** check box to turn the option off.
6. Click **OK** to exit the dialog.
7. To hide the File Creation Date field, double-click the **FIL FLDT** element.
8. On the **Print** tab, clear the **Include in print** check box to turn the option off.
9. Click **OK** to exit the dialog.
10. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.



## Results

The print form now should look like this:



The screenshot shows a print form with the following fields:

- Customer: [Text Box]
- [Text Box]
- [Text Box]
- [Text Box]
- [Text Box]
- [Text Box]
- Customer's Ana Location Code [Text Box]
- Customer's Name [Text Box]
- Customer's Address Line 1 [Text Box]

---

## Customizing the CLO Segment

The CLO segment (Customer's Location) contains details about the specific customer location pertaining to this purchase order. In this tutorial, the CLO segment contains details relating to the specific Pet Zone store to which the order should be sent. Earlier in this tutorial, you customized the CDT segment, which contains details relating to the Pet Zone corporate office.

### About this task

The CLO CLOC CLO0 element (Customer's ANA Location Code) contains the code assigned by the Article Numbering Association for the customer's location. Your trading partner will send you this code, but you do not need the code to be on the printout. Therefore, you will hide this field.

The CLO CNAM element contains the Customer's Name (for the specific location to which the order should be sent). For brevity, you will change the field label to Location.

The elements CLO CADD CAD0, CLO CADD CAD1, CLO CADD CAD2, and CLO CADD CAD3 contain four lines of the customer's address. The CLO CADD CAD4 element contains the post code of the customer's address. The address will correspond to the name in the CLO CNAM element, so you do not need to print a label for the address fields.

Use this procedure to customize the CLO segment.

### Procedure

1. To hide the Customer's ANA Location Code field, do the following:
  - Double-click the **CLO CLOC CLO0** element.
  - On the **Print** tab, clear the **Include in print** check box to turn the option off.
  - Click **OK** to exit the dialog.
2. To change the field label for the Customer's Name field, do the following:
  - Double-click the **CLO CNAM** element.

- On the **Print** tab, enter **Location:** in the Label field to replace the existing text.
  - Click **OK** to exit the dialog.
3. To remove the field label for the Customer's Address Line 1 field, do the following:
    - Double-click the **CLO CADD CAD0** element.
    - On the **Print** tab, delete the text in the Label field.
    - Click **OK** to exit the dialog.
  4. To remove the field label for the Customer's Address Line 2 field, do the following:
    - Double-click the **CLO CADD CAD1** element.
    - On the **Print** tab, delete the text in the Label field.
    - Click **OK** to exit the dialog.
  5. To remove the field label for the Customer's Address Line 3 field, do the following:
    - Double-click the **CLO CADD CAD2** element.
    - On the **Print** tab, delete the text in the Label field.
    - Click **OK** to exit the dialog.
  6. To remove the field label for the Customer's Address Line 4 field, do the following:
    - Double-click the **CLO CADD CAD3** element.
    - On the **Print** tab, delete the text in the Label field.
    - Click **OK** to exit the dialog.
  7. To remove the field label for the Customer's Post Code field, do the following:
    - Double-click the **CLO CADD CAD4** element.
    - On the **Print** tab, delete the text in the Label field.
    - Click **OK** to exit the dialog.
  8. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.

## Results

The section of the print form that contains the fields in the CLO segment now should look like this (you may need to scroll down the form to see these fields):

The screenshot shows a print form layout. On the left, there are two labels: "Customer:" and "Location:". To the right of "Customer:" is a long horizontal input field. Below this field are four smaller horizontal input fields stacked vertically. Below these four fields is a small rectangular input field. To the right of "Location:" is another long horizontal input field. Below this field are three smaller horizontal input fields stacked vertically.

---

## The ORD Segment

### Customizing the ORD ORNO ORN0 Element

The ORD segment (Order References) contains reference information pertaining to this purchase order, such as the purchase order number, the date the order was placed, and the purchase order code.

#### About this task

The ORD ORNO ORN0 element (Customer's Order Number) contains the purchase order number assigned by the customer. You already used a standard rule for this element to assign the document name. For brevity, you will change the field label to Order Number.

Use this procedure to change the field label for the Customer's Order Number field.

#### Procedure

1. Double-click the **ORD ORNO ORN0** element.
2. On the **Print** tab, enter **Order Number:** in the Label field to replace the existing text.
3. Click **OK** to exit the dialog.

### Customizing the ORD ORNO ORN2 Element

The ORD ORNO ORN2 element (Date Order Placed by Customer) contains the date on which the customer placed the purchase order. You will change the screen format for the purchase order date to DD/MM/YY. Also, this element is defined by the standard to be a six-digit date. In this tutorial, the purchase order date will be printed as an eight-digit date, so you will change the element and field lengths to accommodate the longer date. For brevity, you will change the field label to Order Date.

#### About this task

Use this procedure to change the screen format, change the element and field lengths, and rename the field label for the Date Order Placed by Customer field.

#### Procedure

1. Double-click the **ORD ORNO ORN2** element.
2. Select the **Validation** tab.
3. In the Max field, enter **8** to allow the entire date (including the / separators) to be contained in this element.
4. From the Form Format drop-down list box, select **DD/MM/YY** to designate the format for the date on the printout.
5. Select the **Print** tab.
6. In the Label field, enter **Order Date:** to replace the existing text.
7. In the Maximum number of characters field, enter **8** to allow the entire date, including separators (/), to be displayed.
8. Click **OK** to exit the dialog.

## Copying the ORD ORNO CD07 Element

The ORD ORNO CD07 element (Order Code) contains the code representing the type of purchase order (e.g. new order, cancelled order) for this message. You want the more meaningful description of the code to be printed on the printout, instead of the code itself. Therefore, you will hide the Order Code field, but use the code from that element (ORD ORNO CD07) to look up the code description in Code Values List 7 and print that description in another field that you create. The description of the code will be displayed in the new field on the printout. You will rename the new field and change the element and field lengths to accommodate the text from the description of the code.

### About this task

The description of the EDI code in the ORD ORNO CD07 element is important, even though you do not need to print the code itself. For example, the EDI code value "N" is not descriptive enough for users reading a printout of the purchase order. The description of code "N" ("New Order") is meaningful, however.

Before you can print the description of the EDI code value, you must create a new element in the ORNO segment to store and print the description. The new ORNO element is the element that will print the description of the Order Code. You will use the Copy and Paste functions to copy EDI information in the form. Copied form components retain all the information of the original form components.

Use this procedure to copy and paste the ORD ORNO CD07 element.

### Procedure

1. Select the **ORD ORNO CD07** element.
2. Click **Copy** on the Main Toolbar.
3. Select the **ORNO SCRF** composite, which is the last form component in the ORNO segment. The ORNO SCRF composite is the form component after which you want the copy of the ORD ORNO CD07 element to be pasted.
4. Click **Paste** on the Main Toolbar to paste the ORD ORNO CD07 element.
5. Select **Paste after selected item (at the same level)** to paste the Clipboard contents after the ORNO SCRF composite.

A new element (ORD CD07:2) is created. The ORD CD07:2 element is an exact copy of the ORD ORNO CD07 element.

6. Click **OK** to exit the dialog.

## Changing the ORD CD07:2 Element and Field Properties

The system names the new element created from copying the ORD ORNO CD07 element ORD CD07:2. You will rename the new element to identify its purpose, which is to print the description of the code from the ORD ORNO CD07 element.

### About this task

**Note:** If a segment or element occurs more than once in a form, it is identified by its name <ID>. The second and subsequent occurrences are identified by <ID>:n, where "n" is the number of the occurrence in the form.

You will rename the element name and field label corresponding to the newly-created ORD CD07:2 element to reflect the contents of the field (the description of the Order Code). You will also increase the field and element lengths to accommodate the longer description.

Use this procedure to change the rename the element name and field label, and change the field and element lengths, for the ORD CD07:2 element.

### Procedure

1. Double-click the **ORD CD07:2** element.
2. In the Name field, enter **CD07\_DESC** to give the name a more descriptive identifier.
3. On the **Validation** tab, enter **35** in the Max field for the maximum number of characters allowed for this element.
4. Select the **Print** tab.
5. In the Label field, enter **Order Type:** to replace the existing text.
6. In the Maximum number of characters field, enter **35** to allow a thirty-five-character description to be displayed on the printout.
7. Click **OK** to save the new label and exit the dialog.

## Hiding the ORD ORNO CD07 Field and Loading a Code List Table from the Standards

Now that you have created an exact copy of the ORD ORNO CD07 element in order to retain all of the EDI data and formatting associated with that element, you can hide the Order Code field.

### About this task

When you use code list tables, you load a code list table from the standard to tell the system which code list table to use in looking up EDI code values. You can load the specific code values you expect to receive in the EDI data, or you can load the entire code list table. For this tutorial, you will load the entire code list table.

Use this procedure to hide the Order Code field and load the code list table from the standards.

### Procedure

1. Double-click the **ORD ORNO CD07** element. You need to use a code list table for this element.
2. On the **Print** tab, clear the **Include in print** check box to turn the option off and click **OK**.
3. Select the **Use Standard Rule** tab.
4. Click **Use Code** from the drop-down list.
5. Click **Edit** to access the Edit Code List dialog.  
The Table ID field contains "CD07," the name of the element for which this code list table will be used. The Desc field contains "ORDER CODE," the description of the element for which this code list table will be used.
6. Click **Load** to access the Load Code List dialog. You will be prompted to select an ODBC data source name. Select the appropriate DSN and click **OK** to access the Load Code List dialog. The Codes In Standard list box contains the entire code list table.


7. Click **Add All** to move all of the codes in the code list table to the Codes Selected list box.

**Note:** Adding all the codes in the list (by using Add All) creates a much larger form than if you use only selected codes. However, it is necessary for your users to have all the codes available from which to choose.

8. Click **OK** to load the code list table and exit the Load Code List dialog.
9. Click **Close** to exit the Edit Code List dialog.
10. From the Store Field drop-down list box, select **CD07\_DESC ORDER CODE** to store the description in the ORD CD07\_DESC element you created.
11. Click **OK** to exit the Element Properties dialog.
12. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.

## Results

The section of the print form that contains the fields in the ORD segment now should look like this (you may need to scroll down the form to see these fields):



The screenshot shows a section of a print form with the following fields and labels:

- Location: [text box]
- [text box]
- [text box]
- [text box]
- [text box]
- [text box]
- Order Number: [text box]
- Order Date: [text box]
- Order Type: [text box]
- Latest Delivery Date [text box]

---

## Customizing the DIN Segment

The DIN segment (Delivery Instructions) is a conditional segment that contains details about the delivery of the ordered items. For this tutorial, the only delivery instructions you and your trading partner require is the last date on which the items may be delivered.

### About this task

The DIN LDAT element (Latest Delivery Date) contains the last date on which the ordered items may be delivered. You will change the screen format for the last delivery date to DD/MM/YY. Also, this element is defined by the standard to be a six-digit date. In this tutorial, the last delivery date will be printed as an eight-digit date, so you will change the element and field lengths to accommodate the longer date. In addition, you will add a colon (:) to the field label to make the label consistent with the other field labels on the same frame.

Use this procedure to change the screen format, change the field and element lengths, and add a colon (:) to the field label for the Latest Delivery Date field.

## Procedure

1. Double-click the **DIN LDAT** element.
2. On the **Validation** tab, enter **8** in the Max field to allow the entire date (including the / separators) in this element.
3. From the Form Format drop-down list box, select **DD/MM/YY** to designate the format for the date on the printout.
4. Select the **Print** tab.
5. In the Label field, enter **:** after the text in the field label (for consistency).
6. In the Maximum number of characters field, enter **8** to allow the entire date (including the / separators) to be displayed.
7. Click **OK** to exit the dialog.
8. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.

## Results

The section of the print form that contains the field in the DIN segment now should look like this:

The screenshot shows a print form with the following fields and labels:

- Location:** A long horizontal text box.
- Order Number:** A horizontal text box.
- Order Date:** A horizontal text box.
- Order Type:** A horizontal text box.
- Latest Delivery Date:** A horizontal text box.

There are also several unlabeled text boxes, including a small one below the Location field, a small one below the Order Number field, and a small one below the Order Date field. Additionally, there are four horizontal lines stacked vertically to the right of the Location field.

---

## The OLD Group

The OLD group contains details about each line item in the purchase order.

The fields in the OLD group are displayed on a separate frame than the fields you have customized up to now, because the OLD group has a maximum use of 999,999. The fields on the OLD frame will be printed as many times as necessary (up to 999,999 occurrences) before the fields on the next frame (OTR group) are printed.

Within the OLD group, the OLD:2 segment (Order Line Details) contains line item details for the purchase order.

## Customizing the OLD:2 SEQA Element

The OLD:2 SEQA element (First Level Sequence Number) contains the line number for each item on the purchase order. Your trading partner will send you the value "1" for the first line item, and will increment each subsequent line item by one. You and your trading partner have agreed that they will order no more than 99999 line items per purchase order. Because each line item will be numbered sequentially,

starting with one, you will need a maximum length of only five digits for this field. Therefore, you will change the element and field lengths to five. Also, for brevity, you will rename the field label.

### About this task

Use this procedure to change the field and element lengths and rename the field label for the First Level Sequence Number field.

#### Procedure

1. Double-click the **OLD:2 SEQA** element.
2. On the **Validation** tab, enter **5** in the Max field to allow a five-digit number in this element.
3. Select the **Print** tab.
4. In the Label field, enter **Line** to replace the existing text.

**Note:** The label for the First Level Sequence Number field ultimately will form the column heading "Line No." To make the width of the column heading as narrow as possible, you will place "Line" on one line and "No." below. The Label field does not enable you to enter a label on more than one line, so you will enter "Line" in the Label field, then add "No." by adding static text later in this tutorial.

5. In the Maximum number of characters field, enter **5** to allow five numeric digits to be displayed on the printout.
6. Click **OK** to exit the dialog.

## Customizing the OLD:2 SPRO SPR1 Element

The OLD:2 SPRO SPR1 element (Supplier's Code for the Traded Unit) contains the supplier's internal reference identifying the ordered item. In this tutorial, MWT Manufacturing Co. (the supplier) provides a catalogue to its trading partners (customers). The catalogue lists all the items available for ordering, including the supplier's code for each item. Your trading partner will send you the supplier's number corresponding to each item ordered.

### About this task

In this tutorial, the supplier's codes do not exceed ten characters, so you will change the field and element lengths to ten. In addition, for brevity, you will rename the field label.

Use this procedure to change the field and element lengths and rename the field label for the Supplier's Code for the Traded Unit field.

#### Procedure

1. Double-click the **OLD:2 SPRO SPR1** element.
2. On the **Validation** tab, enter **10** in the Max field to allow a ten-character string in this element.
3. Select the **Print** tab.
4. In the Label field, enter **Prod ID** to replace the existing text.
5. In the Maximum number of characters field, enter **10** to allow ten characters to be displayed on the printout.
6. Click **OK** to exit the dialog.



## Customizing the OLD:2 CPRO CPR1 Element

The OLD:2 CPRO CPR1 element (Customer's Item Code) contains the customer's internal reference identifying the ordered item. In this tutorial, your trading partner will send you the customer's item code corresponding to each item ordered. However, you do not need this code to be printed on the printout, so you will hide this element.

### About this task

Use this procedure to hide the Customer's Item Code field.

### Procedure

1. Double-click the **OLD:2 CPRO CPR1** element.
2. On the **Print** tab, clear the **Include in print** check box to turn the option off.
3. Click **OK** to exit the dialog.

## Customizing the OLD:2 UNOR UNO0 Element

The OLD:2 UNOR UNO0 element (Consumer Units in Traded Unit) contains the consumer units information. The standard defines the OLD:2 UNOR UNO0 element as a string data type. However, your trading partner will send you a number-type element in N0 format (formatted with an implicit decimal point and no decimal places). Therefore, you will change the data type and the screen and EDI formats to reflect the data your partner will send you.

### About this task

Also, you and your partner have decided that none of the items you will trade contain a number of units greater than ten digits. You will change the field and element lengths to reflect the smaller number of units. In addition, for brevity, you will rename the field label.

Use this procedure to change the field and element lengths, the data type, and the screen and EDI formats, as well as to rename the field label, for the Consumer Units in Traded Unit field.

### Procedure

1. Double-click the **OLD:2 UNOR UNO0** element.
2. On the **Validation** tab, enter **10** in the Max field to allow a ten-digit number in this element.
3. From the Data Type drop-down list box, select **Number** to allow a number data type in this element. Sterling Gentrans:Server prompts you that changing the field's data type will invalidate its format.
4. Click **Yes** to proceed with modifying the properties of this element.
5. From the Form Format drop-down list box, select **N0** to allow a number with an implied decimal point and no decimal places to be displayed on the printout.
6. From the File Format drop-down list box, select **N0** to indicate that you expect a number with an implied decimal point and no decimal places.
7. Select the **Print** tab.
8. In the Label field, enter **Cons. Units** to replace the existing text.
9. In the Maximum number of characters field, enter **10** to allow a ten-digit number to be displayed on the printout.

10. Click **OK** to exit the dialog.

## Customizing the OLD:2 UNOR CD04 Element

The OLD:2 UNOR CD04 element (Measure Indicator) contains the abbreviation for the ordering measure (such as kilograms, metres, liters) for the ordered item. For brevity, you will rename the field label.

### About this task

Use this procedure to rename the field label for the Measure Indicator field.

### Procedure

1. Double-click the **OLD:2 UNOR CD04** element.
2. On the **Print** tab, enter **Unit** in the label field to replace the existing text.
3. Click **OK** to exit the dialog.

## Customizing the OLD:2 OQTY OQT0 Element

The OLD:2 OQTY OQT0 element (Number of Traded Units Ordered) contains the total number of units ordered (quantity) for each line item, in units defined in the OLD:2 UNOR CD04 element. The standard defines the OLD:2 OQTY OQT0 element as a string data type. However, your trading partner will send you a number-type element in N0 format (formatted with an implicit decimal point and no decimal places). Therefore, you will change the data type and the screen and EDI formats to reflect the data your partner will send you.

### About this task

Also, you know that your trading partner will order no more than 999999 (a six-digit number) of any one item, so you will change the maximum length to six for this field. You will change the field and element lengths to reflect the smaller quantities. In addition, for brevity, you will rename the field label.

Use this procedure to change the field and element lengths, the data type, and the screen and EDI formats, as well as to rename the field label, for the Number of Traded Units Ordered field.

### Procedure

1. Double-click the **OLD:2 OQTY OQT0** element.
2. On the **Validation** tab, enter **6** in the Max field to allow a six-digit number in this element.
3. From the Data Type drop-down list box, select **Number** to allow a number data type in this element. Sterling Gentrans:Server prompts you that changing the field's data type will invalidate its format.
4. Click **Yes** to proceed with modifying the properties of this element.
5. From the Form Format drop-down list box, select **N0** to allow a number with an implied decimal point and no decimal places to be displayed on the printout.
6. From the File Format drop-down list box, select **N0** to indicate that you expect a number with an implied decimal point and no decimal places.
7. Select the **Print** tab.
8. In the Label field, enter **Qty Ord** to replace the existing text.

9. In the Maximum number of characters field, enter **6** to allow a six-digit number to be displayed on the printout.
10. Click **OK** to exit the dialog.

## Customizing the OLD:2 OUCT OUC0 Element

The OLD:2 OUCT OUC0 element (Cost Price) contains the price per unit ordered. This price is the net cost in pounds (e.g. after deducting line discounts, etc., but before the application of VAT) for an item. Your trading partner will send you prices in N4 format (formatted with an implicit decimal point and four decimal places), but you want the price to be displayed on the printout in R4 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the price to look on the printout.

### About this task

Also, you know that the items you sell to Pet Zone are not priced at more than £9999.99 each, so this field needs a maximum length of only ten (four places for the pounds; four places for the pence, if present; one place for the decimal point; and one place for a plus or minus sign, if present). You will change the field and element lengths to reflect the prices you expect. In addition, you will rename the field label Price Each.

Use this procedure to change the field and element lengths, change the screen format, and rename the field label for the Cost Price field.

### Procedure

1. Double-click the **OLD:2 OUCT OUC0** element.
2. Select the **Validation** tab.
3. In the Max field, enter **10** to allow ten numeric digits in this field, including a plus or minus sign and a decimal point.
4. From the Form Format drop-down list box, select **R4** to allow a number with an explicit decimal point and four decimal places to be displayed on the printout.
5. Select the **Print** tab.
6. In the Label field, enter **Price Each** to replace the existing text.
7. In the Maximum number of characters field, enter **10** to allow eight digits on the printout, including a plus or minus sign and a decimal point.
8. Click **OK** to exit the dialog.

## Customizing the OLD:2 TDES TDE0 Element

The OLD:2 TDES TDE0 element (Traded Unit Descr. Line 1) contains the first line of the description of the ordered item. The description will be self-explanatory in the context of the rest of the line item information, so you will remove the label from this field.

### About this task

Use this procedure to remove the field label for the Traded Unit Descr. Line 1 field.

### Procedure

1. Double-click the **OLD:2 TDES TDE0** element.
2. On the **Print** tab, delete the text in the Label field.

3. Click **OK** to exit the dialog.

## Customizing the OLD:2 TDES TDE1 Element

The OLD:2 TDES TDE1 element (Traded Unit Descr. Line 2) contains the second line of the description of the ordered item. The description will be self-explanatory in the context of the rest of the line item information, so you will remove the label from this field.

### About this task

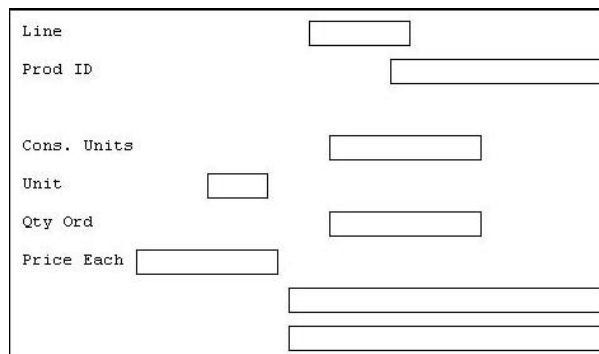
Use this procedure to remove the field label for the Traded Unit Descr. Line 2 field.

### Procedure

1. Double-click the **OLD:2 TDES TDE1** element.
2. On the **Print** tab, delete the text in the Label field.
3. Click **OK** to exit the dialog.
4. Click **Generate Layout** on the Main Toolbar to refresh the display.

### Results

The OLD frame now should look like this:



The screenshot shows a form with the following fields and labels:

Line	
Prod ID	
Cons. Units	
Unit	
Qty Ord	
Price Each	

---

## Customizing the OTR LORD Element

The OTR LORD element contains the Lines Ordered. You will rename the field label.

### About this task

Use this procedure to rename the field label for the Lines Ordered field.

### Procedure

1. Double-click the **OTR LORD** element.
2. On the **Print** tab, enter **Number of Line Items:** in the Label field to replace the existing text.
3. Click **OK** to exit the dialog.
4. Click **Generate Layout** on the Main Toolbar to refresh the display of the print form.
5. The OTR frame now should look like this:

## Results

Number of Line Items: <input type="text"/>
--

## What to do next

Now you are ready to format the fields and their labels to make the fields on the purchase order more consistent and visually attractive.



---

## Chapter 11. Formatting the Print Form for TRADACOMS

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### About Formatting the Print Form

In the previous section of this tutorial, you customized the print form for a purchase order that you will use to print the data you receive from Pet Zone. After successfully customizing the fields and elements of the print form, you are ready to format the layout of the form.

One form can consist of several frames. Each group and repeating segment has a corresponding frame that contains all the groups, segments, and elements at that level. When the form is printed, the frames are printed consecutively, in the order in which they occur in the form. Each frame is not printed on a separate page.

---

### Resizing the Header Frame

When a printout is produced based on the customized print form, the information is arranged according to how the frames and the fields contained in them were arranged when the form was compiled. You should eliminate unnecessary space as you arrange the fields on each frame.

#### About this task

Use this procedure to resize the header frame.

#### Procedure

1. Click one of the following segments segment to display the Beginning Segment for Purchase Order (header) frame in the Layout Window.
  - **BEG** (for ANSI X12)
  - **BGM** (for EDIFACT)
  - **ORDHDR** (for TRADACOMS)
2. To display more of the form on your screen, click and drag the center bar between the EDI File Format Window and the Layout Window to the left until the Layout Window is wide enough to display as much of the form as you want.
3. To resize the header frame, click and drag the right side of the frame approximately to the 20 cm. mark on the horizontal ruler (a form with a width of 20 cm. can be printed on an 8 1/2" x 11" or A4 sheet of paper).

---

### Adding a Title to the Form

You want the form to have a title designating the standard agency, version, type of document/message, and the trading partner for which this form is used. You add a title to the print form by adding static text.

#### About this task

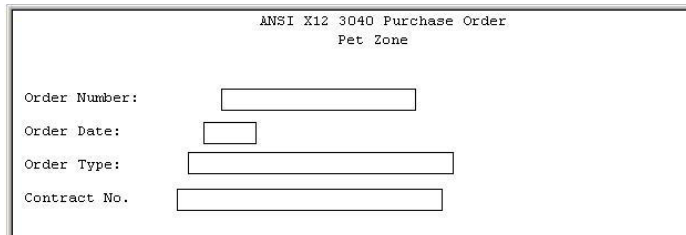
Use this procedure to add and position the title for the form and center it.

## Procedure

1. Select all the fields and field labels on the frame. Drag your selection approximately two or three centimeters lower on the frame to make room at the top of the frame for the title.
2. Click **Add Text** on the Main Toolbar.  
A text box is added to the current frame, displayed in the upper left corner of the frame.
3. In the new selected text box, enter one of the following and click **OK**.
  - **ANSI X12 3040 Purchase Order**
  - **EDIFACT 92.1 Purchase Order**
  - **TRADACOMS ANA001 ORDERS Release 9**
4. Click **Add Text** on the Main Toolbar. Enter **Pet Zone** and click **OK**.
5. Click and drag the first line of static text so that the text is centered on the first line of the frame.
6. Click and drag the second line of static text (**Pet Zone**) so that the text is centered on the second line of the frame.

## Results

The header frame should look similar to the following. (This is an ANSI X12 example; some details may be different for EDIFACT and TRADACOMS.)



ANSI X12 3040 Purchase Order  
Pet Zone

Order Number:

Order Date:

Order Type:

Contract No.

---

## Header Fields

By default, each field and its associated label are printed on their own line. However, it is common for purchase orders and forms to arrange some fields in columns of information.

The first fields you will rearrange are the header fields. For ANSI X12, these fields are associated with the BEG and REF segments. For EDIFACT, these fields are associated with the BGM, DTM, and FTX segments, and the RFF and PAT groups. For TRADACOMS, these fields are associated with the ORDHDR group and the CLO, ORD, and DIN segments.

You prevented some of the field labels from being printed (by removing the field label in the Label box of the Print dialog). For these fields, the fields are displayed on your print form, but their associated labels are not.

## Resizing the Header Fields

When you customized the element properties in the previous section of this tutorial, you changed the display lengths for some of the fields on the header frame. The fields that are displayed in the Layout Window currently reflect the



default display lengths for the fields. To reflect the new sizes of the fields in the Layout Window, you must select the fields for which you changed the display lengths, then resize the fields.

### About this task

Use this procedure to resize the fields on the header frame.

### Procedure

1. Select all the fields on the header frame. (For TRADACOMS, these are the **Latest Delivery Date** and **Order Date** fields.)
2. Select **Display > Size to Length**. The selected fields are resized to the lengths specified in the Maximum number of characters box of the Print dialog for each field.

## Moving Header Fields and Labels - TRADACOMS

### About this task

Use this procedure to move and align the fields and field labels on the header frame.

### Procedure

1. Select each field individually and drag it closer to its respective field label. (Do not move fields that are not labelled.)
2. Select the **Order Number** label and field and drag them to the upper left corner on the frame (below the heading).
3. Select the **Order Date** label and field and drag them to the right of the Order Number label and field (at approximately 12.5 cm on the horizontal ruler).
4. Select the **Order Type** label and field and drag them below the Order Number label and field.
5. Select the **Latest Delivery Date** field and drag it below the Order Date label and field.
6. Select the **Customer** label and field and drag them below the Order Type label and field.
7. Select the following fields and drag them below the Customer field:
  - Customer's Address Line 1
  - Customer's Address Line 2
  - Customer's Address Line 3
  - Customer's Address Line 4
  - Customer's Post Code
8. Select the **Location** label and field and drag them below the Customer's Post Code field.
9. Select the following fields and drag them below the Location field:
  - Customer's Address Line 1
  - Customer's Address Line 2
  - Customer's Address Line 3
  - Customer's Address Line 4
  - Customer's Post Code
10. Select the following field labels:
  - Order Number

- Order Type
- Customer
- Location

Then select **Display > Align Controls > Left**.

11. Select the **Order Date** and **Latest Delivery Date** field labels. Then select **Display > Align Controls > Left**.
12. Select the **Order Type** and **Order Number** fields (in that order). Then select **Display > Align Controls > Left**.
13. Select the **Order Date** and **Latest Delivery Date** fields (in that order). Then select **Display > Align Controls > Left**.
14. Select all the **Customer** and **Location** fields (Customer's Address Line 1, Customer's Address Line 2, Customer's Address Line 3, Customer's Address Line 4, and Customer's Post Code). Then select **Display > Align Controls > Left**.
15. Click **Lock Labels** on the Main Toolbar. When you select a field, its corresponding field label will be selected also.
16. Select the **Order Number** and **Order Date** fields. (Their field labels will be selected, too, because you have the Lock Labels function turned on.) Then select **Display > Align Controls > Top**.
17. Select the **Order Type** and **Latest Delivery Date** fields. Then select **Display > Align Controls > Top**.
18. Select the **Customer** field. Then select **Display > Align Controls > Top**.
19. Select the **Location** label and field. Then select **Display > Align Controls > Top**.
20. To resize the frame, click and drag the bottom of the frame to just below the Customer's Post Code field for the Location address.
21. Click **Lock Labels** on the Main Toolbar to turn off the Lock Labels function.

## Results

The header frame now should look like this:

The screenshot shows a window titled "Pet Zone" containing a form with the following layout:

- Order Number:** [text box] **Order Date:** [text box]
- Order Type:** [text box] **Latest Delivery Date:** [text box]
- Customer:** [text box]
- [text box]
- [text box]
- [text box]
- [text box]
- [text box]
- Location:** [text box]
- [text box]
- [text box]
- [text box]
- [text box]

---

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