

# webMethods Trading Networks User's Guide

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This document applies to webMethods Trading Networks 10.15 and to all subsequent releases.

Specifications contained herein are subject to change and these changes will be reported in subsequent release notes or new editions.

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# About this Guide

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This guide describes how to monitor webMethods Trading Networks activity. It explains how to analyze the exchange of documents in your trading network, including how to search for and view documents that have flowed through your trading network and how to view audit logs of events that have occurred in your trading network.

**Note:**

The webMethods for Partners product provides the same functionality as Trading Networks. For simplicity, this guide refers only to Trading Networks, but the information applies to both products. The difference between the products is that Trading Networks allows you to have an unlimited number of partners, while webMethods for Partners allows you to have only one partner.

## Document Conventions

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| Convention     | Description  |
|----------------|--|
| <b>Bold</b>    | Identifies elements on a screen.   |
| Narrowfont     | Identifies service names and locations in the format <i>folder.subfolder.service</i> , APIs, Java classes, methods, properties.  |
| <i>Italic</i>  | Identifies:<br><br>Variables for which you must supply values specific to your own situation or environment.<br>New terms the first time they occur in the text.<br>References to other documentation sources. |
| Monospace font | Identifies:<br><br>Text you must type in.<br>Messages displayed by the system.<br>Program code.  |
| { }            | Indicates a set of choices from which you must choose one. Type only the information inside the curly braces. Do not type the { } symbols.   |
|                | Separates two mutually exclusive choices in a syntax line. Type one of these choices. Do not type the   symbol.  |
| [ ]            | Indicates one or more options. Type only the information inside the square brackets. Do not type the [ ] symbols.  |
| ...            | Indicates that you can type multiple options of the same type. Type only the information. Do not type the ellipsis (...).  |

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## Online Information and Support

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### Product Documentation

You can find the product documentation on our documentation website at <https://documentation.softwareag.com>.

In addition, you can also access the cloud product documentation via <https://www.softwareag.cloud>. Navigate to the desired product and then, depending on your solution, go to “Developer Center”, “User Center” or “Documentation”.

### Product Training

You can find helpful product training material on our Learning Portal at <https://learn.softwareag.com>.

### Tech Community

You can collaborate with Software AG experts on our Tech Community website at <https://techcommunity.softwareag.com>. From here you can, for example:

- Browse through our vast knowledge base.
- Ask questions and find answers in our discussion forums.
- Get the latest Software AG news and announcements.
- Explore our communities.
- Go to our public GitHub and Docker repositories at <https://github.com/softwareag> and <https://containers.softwareag.com/products> and discover additional Software AG resources.

### Product Support

Support for Software AG products is provided to licensed customers via our Empower Portal at <https://empower.softwareag.com>. Many services on this portal require that you have an account. If you do not yet have one, you can request it at <https://empower.softwareag.com/register>. Once you have an account, you can, for example:

- Download products, updates and fixes.
- Search the Knowledge Center for technical information and tips.
- Subscribe to early warnings and critical alerts.
- Open and update support incidents.
- Add product feature requests.

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## Data Protection

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Software AG products provide functionality with respect to processing of personal data according to the EU General Data Protection Regulation (GDPR). Where applicable, appropriate steps are documented in the respective administration documentation.

# 1 Understanding webMethods Trading Networks

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## webMethods Trading Networks

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A *trading network* is a group of organizations that have agreed to exchange business documents. Participants might include strategic partners, buyers, suppliers, and marketplaces (for example, Ariba Network), and are referred to as *trading partners*. Business documents typically include purchase orders, order statuses, purchase order acknowledgements, invoices, and other domain-specific business documents.

webMethods Trading Networks enables your corporation to connect to other organizations to form a business-to-business (B2B) trading network. Through Trading Networks, your organization can exchange business documents with the partners in your network to relay production information. The business documents can be in any format that is recognized by two partners, such as XML or flat file. Trading Networks is also the base through which webMethods products support numerous eBusiness Standards (eStandards) such as RosettaNet, EDI, ebXML Messaging Service, SWIFT, FIX, and CIDX.

My webMethods is a Web-based user interface framework that supports administration and monitoring user interfaces for webMethods products. The Trading Networks user interface in My webMethods lets you perform all Trading Networks tasks.

Administrators use *permissions* to control the data you can view in My webMethods and the actions you can take against the data. If you do not have certain permissions, My webMethods might not display pages, buttons, or other user interface controls required to perform the actions described in this guide. If a procedure instructs you to perform an action that is not available, ask an administrator to grant you the permissions needed to perform the action.

The Trading Networks database stores all information about the trading network, such as partner information, types of documents to process, processing actions, and log activity. When you monitor Trading Networks assets, you can work with the Trading Networks production database or the Trading Networks database to which production data has been archived (that is, the Trading Networks archive database).

## Assets and Processing

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This section briefly explains assets and processing you must understand to perform the tasks in this guide.

The following table describes the assets:

| Asset               | Description  |
|---------------------|--|
| Document attributes | Define pieces of document content, such as sender or receiver, user status, or purchase order amount.  |
| Document types      | Define categories of documents, such as XML or flat file. Documents can also specify pre-processing actions to perform for documents you receive, such as saving documents to the Trading Networks database. |

**Note:**

| Asset            | Description  |
|------------------|--|
|                  | You can only perform the tasks in this guide on documents that have been saved to the Trading Networks database.   |
| Processing rules | <p>Define pre-processing and processing actions to perform for documents you receive. Processing actions can include executing a service and delivering a document to a partner. Document delivery can include these types of delivery:</p> <ul style="list-style-type: none"> <li>■ Immediate delivery, in which Trading Networks delivers documents directly to the partner.</li> <li>■ Scheduled delivery, in which Trading Networks places documents in a <i>queue</i> and delivers the documents in batches to the partner at scheduled times.</li> </ul> |
| Profiles         | Identify your corporation and the corporations of the partners in your trading network, and specify how to connect to partners and exchange documents.   |

Some documents might require multi-step processing that involves interaction among systems, people, and trading partners. An example of such processing is the fulfillment of a purchase order that includes a purchase order document, human interaction to determine whether to approve the purchase order, and either an order acknowledgment (ACK) document or an order negative acknowledgment (NACK) document. For such processing, you can define a *business process*, and you can use the business process instead of or in addition to a processing rule. For complete information on business processes, see the webMethods BPM documentation.

Trading Networks processes documents as follows:

1. A document enters the Trading Networks system (for example, a partner sends a document).
2. Trading Networks compares the document to defined document types until it finds a match. This is called *document recognition*.
3. Trading Networks extracts document attributes from the document and performs any pre-processing actions that are defined in the document type.
4. If the document type indicates to use a processing rule for the document, Trading Networks compares the document to your defined processing rules until it finds a match. Trading Networks then performs the pre-processing and processing actions defined in the processing rule.

If the rule defines an action to execute a service, and the action uses *reliable execution* to make repeated attempts, Trading Networks creates a *service execution task* to keep track of the attempts.

If the rule defines an action to deliver a document, and the action uses *reliable delivery* to make repeated attempts, Trading Networks creates a *delivery task* to keep track of the attempts.

If a document matches no or multiple document types, the document is considered to have an *unknown document type*. Since document types identify the attributes to extract from a document, Trading Networks cannot extract attributes from a document whose document type is unknown. However, if you have a processing rule that processes unknown document types, Trading Networks does try to process the document using that rule.

If a document was sent by one of your partners but Trading Networks cannot determine the sender (for example, because the document type is unknown and the document sender attribute could not be extracted), the sender is considered an *unknown partner*. If you have a processing rule that processes documents that are sent by the partner, the document will not match the rule and the document will not be processed.

## Documents

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You can view the following for documents:

- Document attributes and content.
- Delivery and service execution tasks that are associated with documents.
- Log entries that describe the processing performed for the document.
- Comments associated with documents. You can also add or update comments.

If an administrator has saved a document to the Trading Networks database, you can send it through your Trading Networks system again. You might want to send a document through the system again in these cases:

- A document might encounter problems during document recognition or attribute extraction (for example, a document might have an unknown document type). You can address any issues (for example, ask an administrator to create a matching document type) and then *resubmit* the document. Trading Networks creates a new instance of the document and sends the new instance through the entire processing described in [“Assets and Processing” on page 10](#). (The original document remains unchanged.)
- A document might need different rule processing than it received (for example, the document might have been processed by the wrong rule, or you might want to change the user status and send the document through the system again). You can address any issues (for example, ask an administrator to create a new processing rule) and then *reprocess* the document. When you reprocess a document, Trading Networks uses the document type it already matched to the document and the document attributes it already extracted from the document, but it compares the document to the processing rules again and reprocesses the document using the matching rule.
- View documents that are related in some way (*related documents*), as follows:
  - Trading Networks automatically relates documents that are part of a business process.
  - When you resubmit a document, Trading Networks automatically relates the new instance it creates to the original document.

- You can ask an administrator or developer to manually relate documents to one another; for example, you might want to relate a purchase order you received to the acknowledgment you sent in response. An administrator or developer can relate documents using the `wm.tn.doc:relateDocuments` built-in service.

## Tasks

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You can view information about delivery tasks and service execution tasks, including status, and you can manage tasks as described in the following table:

| Action   | Description   |
|----------|---|
| Stop     | <p>You can stop delivery of a document or execution of a service.</p> <ul style="list-style-type: none"> <li>■ You might want to stop an immediate delivery task because the receiver of the document is unavailable.</li> <li>■ You might want to stop a service execution task because you need to modify the service.</li> <li>■ You might want to stop a delivery or service execution task because you are running Trading Networks in a clustered environment and want to reassign the task to another Trading Networks instance in the cluster.</li> </ul> |
| Reassign | If you have multiple Trading Networks instances and the host Integration Servers are clustered, you can reassign a task from one Integration Server to another in the cluster.  |
| Restart  | You can restart a stopped or failed task. When you restart a task, Trading Networks resets the retry count to zero and retries the task up to the maximum number of allowed retries.  |
| Delete   | You can manually delete tasks you no longer need.   |

## Logging

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If an administrator had Trading Networks save a document to its database and write activity log entries for the document, Trading Networks recorded entries throughout document processing to its *activity log*. You can view the activity log in My webMethods.

The Integration Server *server log* contains information about operations and errors that occur on Integration Server, such as the starting of subsystems and the loading of packages. Trading Networks writes log entries directly to the server log of its host Integration Server. You can activate or deactivate logging and specify the amount of detail to write to the server log. For complete information, see the *webMethods Audit Logging Guide*.



## 2 Preparing to Work with Documents, Tasks, and Activity Log Entries

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## Selecting the Database to Work with

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You can choose to work with documents, tasks, and activity log entries that are available in the production database or the archive database.

### ➤ To select the database to work with

1. In My webMethods: **Monitoring > Integration > B2B > Transactions**.
2. On the **DataSource** panel, in the **Data Source** field, choose to work with **Production Data** or **Archived Data**.

## Preparing to Search for Documents, Tasks, and Activity Log Entries

---

To find documents, tasks, or activity log entries, you search the Trading Networks database you selected in [“Selecting the Database to Work with” on page 16](#).

You can specify the options below for searches. For instructions, see *Working with My webMethods*.

- You can specify the search tab to display (for example, Basic or Advanced) and a search to execute when you first display the search page.
- You can specify the maximum number of search results to display, the number of rows to display on each results page, the columns to display, and how to sort the results.

For document searches, you can also specify the options below. For instructions, see the procedure that follows.

- You can specify the maximum page size for displaying document content. A very low number might require you to page more through the content. A larger number will reduce the number of pages, but you might have to scroll within a page to view all the content. An extremely large number might affect display performance.
- If you are specifying a complex document search on the Advanced search tab, and you switch to a simple search on the Basic tab, the advanced search criteria will be lost. You can indicate whether you want to be warned of this when you switch.
- The Administrator can set the Web Service Timeout field. If a query takes longer than the Timeout value, it throws the Web Service Timeout exception.

### ➤ To specify maximum page size and whether you want to be warned

1. In My webMethods: **Monitoring > Integration > B2B > User Preferences**.
2. In the **Content Viewer Page Size** field, indicate the maximum number of kilobytes (KB) of document content to display per page. The default is 32 KB.

3. If you want to be warned before switching from a complex search to a simple search, and losing complex search specifications, select the **Warn Before Clearing Search Criteria** check box.

## **Resetting the Local Cache of Trading Networks Information**

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Every time you log on to My webMethods, Trading Networks resets your local cache with the latest design-time asset data in the database. Whenever you access Trading Networks data, the data is retrieved from your local cache rather than the database. You can also manually update your local cache during a session using the procedure below.

### **> To manually update your local cache**

1. In My webMethods: **Monitoring > Integration > B2B > User Preferences**.
2. In the **Reset Local Cache** field, click **Reset**.



# 3 Finding Documents, Tasks, and Activity Log Entries

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## Finding Trading Networks Assets

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You can find Trading Networks documents using a simple or advanced search. To find Trading Networks tasks or activity log entries you must use advanced search.

You create a search by specifying one or more rows of search criteria elements. Each row represents an expression. In the expression, you specify the field to query (that is, the query field). In a simple search, you also specify one operator, and in most cases, a value (for example, `Document ID EQUALS 53o6eh006e1d6gbq0000cuih`). In an advanced search, you can specify multiple operator/value pairs (for example, `Document ID EQUALS 53o26300c9qje9nh0000009b AND Sender ID EQUALS 53o6fh005kjhjs460000000o`), and Trading Networks selects assets that match any of the operator/value pairs.

In a simple search, if you specify multiple rows (expressions), Trading Networks only selects documents that meet the search criteria in all rows. In an advanced search, you can have Trading Networks select assets that meet the search criteria in all rows or in any row.

Trading Networks constructs a SQL WHERE clause from each row of criteria. You can view the clause, and you can cut and paste the query for use in another application, such as a third-party reporting tool.

You can also use a date range to search for documents that Trading Networks received within a specified time period, or tasks or activity log entries that Trading Networks created within a specified time period.

You can use the wildcard `*` in searches to match one or more characters, or the wildcard `?` to match one character. Searches are case insensitive. You can save searches so you can re-execute them later.

**Note:**

Some types of information, such as document content, are saved to database only if the Trading Networks administrator has chosen to save them. If you do not see information you need in search results, discuss the issue with the Trading Networks administrator.

## Finding Documents Using a Simple Search

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➤ **To find documents using a simple search**

1. In My webMethods: **Monitoring > Integration > B2B > Transactions**.
2. Click the **Basic** tab.
3. Click a query field in the **Field** list (see [“Document Query Fields” on page 22](#)).
4. Click the operator to use in the **Operator** list.
5. If necessary, specify a value. You can use the `*` wildcard to match zero or more characters or `?` to match a single character.

6. To add another query field, click  and repeat the steps above.
7. To search for documents that Trading Networks received and processed on a specific day or during a specified time period, use the **Date Range** fields.
8. Click **Search**. Trading Networks displays the search results below the search panel.
9. To view the SQL WHERE clause that Trading Networks constructs from your search criteria, click **Show SQL**.

## Finding Documents, Tasks, or Activity Log Entries Using a Advanced Search

---

The instructions below sometimes include the need to search for partners. For instructions, see *webMethods Trading Networks Administrator's Guide*.

### ➤ To find assets using advanced search

1. In My webMethods: **Monitoring > Integration > B2B**.
2. For documents, click the **Advanced** tab. For tasks or activity log entries, click the **Basic** tab.
3. Select a query field from the **Field** list and click **Edit**. For query field descriptions for the type of asset you are searching for, see the appropriate section later in this chapter. You can use each query field only once.

The following table describes the asset types and search:

| Asset Search | Selection  |
|--------------|--|
| Documents    | <p>The <b>Receiver</b> or <b>Sender</b> query field, you can do either of the following:</p> <ul style="list-style-type: none"> <li>■ Specify the partners to use in the search. Click <b>Select Partners</b>, use the Keyword or Advanced tab to search for partners, then move the partners you want to find from the <b>Available Partners</b> list to the <b>Selected Partners</b> list.</li> <li>■ Build a query for partners. This is useful if you plan to save the query and want the search for partners to produce updated results each time the saved transaction search is run. Click <b>Build Partner Search</b> and use the Keyword or Advanced tab to search for partners. Trading Networks shows the results in the <b>Available Partners</b> list. Trading Networks will use <i>all</i> these results for documents, so be sure to tailor your query so that it returns only the partners you want to use.</li> </ul> |

| Asset Search         | Selection   |
|----------------------|---|
| Tasks                | The <b>Receiver</b> query field, use the Keyword or Advanced tab to search for partners, then move the partners you want to find from the <b>Available Partners</b> list to the <b>Selected Partners</b> list.  |
| Activity log entries | The <b>Partner</b> query field, use the Keyword or Advanced tab to search for partners, then move the partners you want to find from the <b>Available Partners</b> list to the <b>Selected Partners</b> list.   |
| Any of the above     | A query field other than those listed above, do the following: <ol style="list-style-type: none"> <li>In the <b>Operators</b> list, click the operator to use.</li> <li>If necessary, specify a value. You can use the * wildcard to match zero or more characters or ? to match a single character.</li> <li>To add another operator and value, click . To finish with the query field, click <b>OK</b>.</li> </ol> |

- To add another query field, click  and repeat the previous step.
- Use the **Date Range** area to search for documents that Trading Networks received within a specified time period, or to search for tasks or activity log entries that Trading Networks created within a specified time period.
- In the **Search Condition** list, indicate whether to search for assets that match all (click **AND**) or any (click **OR**) of the rows (expressions).
- Click **Search**. Trading Networks displays the search results below the search panel.
- To view the SQL WHERE clause that Trading Networks constructs from your search criteria, click **Show SQL**.

## Document Query Fields

The following table lists the standard document query fields. In addition to the fields that are listed, Trading Networks provides document query fields that correspond to custom attributes that are defined in your system.

| Query Field            | Condition to select document   |
|------------------------|--|
| <b>Comment</b>         | Associated comment. For example, to find documents that have not yet been handled by another user, you might search for documents that have a blank comment. |
| <b>Conversation ID</b> | Conversation ID. For example, you can find documents that are:   |

| Query Field               | Condition to select document  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
|---------------------------|---|--------|-------------|----------------|--|-----------------|--|---------------------------|---|-------------|--|---------------------|--|------------|------------------------|-------------------|--|-----------------|----------------------------------|
|                           | <ul style="list-style-type: none"> <li>■ Part of the same business process (that is, conversation) by specifying the conversation ID for the business process.</li> <li>■ Not part of a business process by searching for documents whose conversation ID is blank.</li> </ul>  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>Document ID</b>        | Document ID.  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>Document Type</b>      | The document being a specified document type, not a specified document type such as XML, FF or EDI, or an unknown document type.  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>Group ID</b>           | Identifier that associates a document with other documents in a group. Grouping documents is helpful for end users doing document searches.   |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>Internal ID</b>        | Internal ID generated by Trading Networks when the document arrived. To see a document's internal ID, go to <b>Monitoring &gt; Integration &gt; B2B &gt; Transactions</b> and click the Attributes tab.   |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>NS Name</b>            | Namespace.  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>Processing Status</b>  |   |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
|                           | <table border="1"> <thead> <tr> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><b>ABORTED</b></td> <td>Encountered a fatal error during document recognition or processing.</td> </tr> <tr> <td><b>ACCEPTED</b></td> <td>Receiving partner retrieved the document from the queue for polling and successfully processed it.</td> </tr> <tr> <td><b>ACCEPTED W/ ERRORS</b></td> <td>Receiving partner retrieved the document from the queue for polling but encountered errors while processing it.</td> </tr> <tr> <td><b>DONE</b></td> <td>Completed document processing. If the processing rule specified: <ul style="list-style-type: none"> <li>■ Asynchronous service execution, the service might not have finished executing.</li> <li>■ Document delivery, the document might not yet have been delivered to the receiving partner.</li> </ul> </td> </tr> <tr> <td><b>DONEW/ERRORS</b></td> <td>Completed document recognition and processing with errors. Asynchronous service execution or document delivery might not have completed.</td> </tr> <tr> <td><b>NEW</b></td> <td>Received the document.</td> </tr> <tr> <td><b>NOT ROUTED</b></td> <td>Received and recognized the document but no processing rule is to be used.</td> </tr> <tr> <td><b>POLLABLE</b></td> <td>Queued the document for polling.</td> </tr> </tbody> </table> | Status | Description | <b>ABORTED</b> | Encountered a fatal error during document recognition or processing. | <b>ACCEPTED</b> | Receiving partner retrieved the document from the queue for polling and successfully processed it. | <b>ACCEPTED W/ ERRORS</b> | Receiving partner retrieved the document from the queue for polling but encountered errors while processing it. | <b>DONE</b> | Completed document processing. If the processing rule specified: <ul style="list-style-type: none"> <li>■ Asynchronous service execution, the service might not have finished executing.</li> <li>■ Document delivery, the document might not yet have been delivered to the receiving partner.</li> </ul> | <b>DONEW/ERRORS</b> | Completed document recognition and processing with errors. Asynchronous service execution or document delivery might not have completed. | <b>NEW</b> | Received the document. | <b>NOT ROUTED</b> | Received and recognized the document but no processing rule is to be used. | <b>POLLABLE</b> | Queued the document for polling. |
| Status                    | Description   |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>ABORTED</b>            | Encountered a fatal error during document recognition or processing.  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>ACCEPTED</b>           | Receiving partner retrieved the document from the queue for polling and successfully processed it.  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>ACCEPTED W/ ERRORS</b> | Receiving partner retrieved the document from the queue for polling but encountered errors while processing it.   |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>DONE</b>               | Completed document processing. If the processing rule specified: <ul style="list-style-type: none"> <li>■ Asynchronous service execution, the service might not have finished executing.</li> <li>■ Document delivery, the document might not yet have been delivered to the receiving partner.</li> </ul>  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>DONEW/ERRORS</b>       | Completed document recognition and processing with errors. Asynchronous service execution or document delivery might not have completed.  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>NEW</b>                | Received the document.  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>NOT ROUTED</b>         | Received and recognized the document but no processing rule is to be used.  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |
| <b>POLLABLE</b>           | Queued the document for polling.  |        |             |                |  |                 |  |                           |   |             |  |                     |  |            |                        |                   |  |                 |                                  |

| Query Field                   | Condition to select document   |
|-------------------------------|--|
|                               | <b>QUEUED</b> Received the document and placed it in a scheduled delivery queue.   |
|                               | <b>REPROCESSED</b> Successfully reprocessed the document.  |
|                               | <b>REPROCESSED AND ABORTED</b> Encountered a fatal error while reprocessing the document.  |
|                               | <b>REPROCESSED W/ERROR</b> Encountered non-fatal errors while reprocessing the document.   |
|                               | <b>REPROCESSING</b> Is currently reprocessing the document.  |
|                               | <b>RESUBMITTED</b> Successfully recognized and processed the resubmitted document.   |
|                               | <b>RESUBMITTED AND ABORTED</b> Encountered a fatal error while resubmitting the document.  |
|                               | <b>RESUBMITTED W/ERROR</b> Encountered non-fatal errors while resubmitting the document.   |
|                               | <b>RESUBMITTING</b> Is currently resubmitting the document.  |
| <b>Receiver</b>               | Receiving partner's full corporation name. The search is case insensitive. To search for documents with unknown receivers, search for Unknown. |
| <b>Receiver Partner Group</b> | Partner group that contains the specified receiving partner.   |
| <b>Sender</b>                 | Sending partner's full corporation name. The search is case insensitive. To search for documents with unknown senders, search for Unknown.     |
| <b>Sender Partner Group</b>   | Partner group that contains the specified sending partner.   |
| <b>Task Status</b>            | See Task Status in <a href="#">"Task Query Fields"</a> on page 24.   |
| <b>User Status</b>            | User status.   |

## Task Query Fields

---

| Query Field            | Selects delivery tasks based on   |
|------------------------|---|
| <b>Delivery Method</b> | For delivery tasks, method being used to deliver the document to the receiving partner. |
| <b>Queue Name</b>      | For a scheduled delivery task, name of the scheduled delivery queue.                    |
| <b>Receiver</b>        | For delivery tasks, receiving partner.  |

| Query Field        | Selects delivery tasks based on |   |
|--------------------|---------------------------------|---|
| <b>Task Status</b> | <b>Status</b>                   | <b>Means that Trading Networks...</b>   |
|                    | <b>DONE</b>                     | Successfully delivered the document or executed the service.<br><br><b>Note:</b><br>For service execution, the service return value for <i>Status</i> is <i>success</i> .   |
|                    | <b>FAILED</b>                   | Reached the maximum retry limit for the task without succeeding in delivering the document or executing the service.<br><br><b>Note:</b> <ul style="list-style-type: none"> <li>■ For service execution, the return value for <i>Status</i> for each service execution was <i>fail</i>.</li> <li>■ If you want to be notified when tasks fail, ask an administrator to create an Integration Server trigger that subscribes to the <i>wm.tn.rec:TaskFailure</i> IS document type (see <i>Publish-Subscribe Developer's Guide</i>).</li> </ul> |
|                    | <b>HELD</b>                     | Is not trying to deliver the document because delivery is suspended for the receiving partner   |
|                    | <b>NEW</b>                      | For immediate delivery tasks or service executions, created the task but has not yet tried to deliver the document or execute the service.  |
|                    | <b>PENDING</b>                  | For immediate delivery tasks or service executions, has tried but not yet succeeded in delivering the document or execute the service.  |
|                    | <b>STOPPED</b>                  | For immediate delivery tasks or service executions, stopped trying to deliver the document or execute the service due to a manual user action.  |
|                    | <b>QUEUED</b>                   | For scheduled delivery tasks, has added the delivery task to the scheduled delivery queue.  |
|                    | <b>DELIVERING</b>               | For scheduled delivery tasks, has invoked the scheduled delivery service and is trying to deliver the document.   |

|                    |   |
|--------------------|---|
| <b>Query Field</b> | <b>Selects delivery tasks based on</b>        |
| <b>Task Type</b>   | Type of task (Delivery or Service Execution). |

## Activity Log Query Fields

The following table describes the Activity Log query fields:

| <b>Query Field</b>                    | <b>Activity Log Entry Criteria</b>  |
|---------------------------------------|---|
| <b>Activity Class</b>                 | Type of activity Trading Networks was performing when it wrote the entries.                                     |
| <b>Class</b>                          | <b>Trading Networks Adds the Entry</b>  |
| <b>Comments</b>                       | Adding or updating a document comment.  |
| <b>Conversation</b>                   | Performing actions for a business process.  |
| <b>Delivery</b>                       | Delivering a document using reliable delivery.  |
| <b>Document Type Administration</b>   | Adding or updating a document type.   |
| <b>Envelope</b>                       | Extracting the ConversationID, DocumentID, GroupID, ReceiverID, or SenderID document attribute from a document. |
| <b>Processing</b>                     | Processing a document using a processing rule.  |
| <b>Processing Rule Administration</b> | Adding or updating a processing rule.   |
| <b>Profile Administration</b>         | Adding or updating a partner profile.   |
| <b>Recognition</b>                    | Comparing a document to document types.   |
| <b>Role Based Access</b>              | Updating role-based access permissions in My webMethods.  |
| <b>Saving</b>                         | Saving a document to the Trading Networks database.   |
| <b>TPA Usage and Settings</b>         | Adding or updating a trading partner agreement.   |
| <b>Validation</b>                     | Validating a document's structure against a schema.   |
| <b>Verification</b>                   | Verifying the digital signature of a document.  |
| <b>Polling</b>                        | Partners were polling for documents in your system or your system was polling partner systems for documents.    |

---

| Query Field            | Activity Log Entry Criteria   |
|------------------------|---|
|                        | <b>General</b> Other unspecified error messages and warnings.   |
| <b>Activity Type</b>   | Severity level of the entry.  |
| <b>Brief Message</b>   | Brief message in the entries. This field is case-sensitive; be sure to use the correct combination of upper- and lowercase letters. |
| <b>Full Message</b>    | Full message in the entries. This field is case-sensitive; be sure to use the correct combination of upper- and lowercase letters.  |
| <b>Conversation ID</b> | Business process (or <i>conversation</i> ) for which the entries were written.  |
| <b>Document Type</b>   | Document type of the documents for which the entries were written.  |
| <b>Partner</b>         | Sending or receiving partner for the documents for which the entries were written.  |
| <b>Processing Rule</b> | Processing rule for the documents for which the entries were written.   |
| <b>User Name</b>       | User name associated with the activities for which the entries were written.  |



# 4 Managing and Tracking Documents

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## Working with Attributes, Content, Comments, Tasks, and Activity Log Entries

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Search for documents using the instructions in [“Finding Documents, Tasks, or Activity Log Entries Using a Advanced Search”](#) on page 21. Then **Click to view details** for a document in the search results. Trading Networks displays the details below the search results, in the Transaction Details panel, and uses several tabs in the panel to display the details for a document.

If you want to send the transaction details page link for a document to an interested party through an e-mail, in the Transaction Details panel, click **Send link to this document**. Trading Networks drafts an e-mail in your default mailbox that includes the link.

## Viewing Document Attributes and Changing User Status

Click the Attributes tab. The tab shows the name of each attribute that was extracted from the document and the data type and value of the attribute.

You can change the value of the User Status attribute that is associated with the document. To do so, type a new value in the **User Status** field and click **Save**.

## Working with Document Content

Click the Content tab. The tab shows the name, size, and type of each content part. If the storage type is tspace, the document is considered large. The storage reference provides details about the physical file to which the document was written in tspace.

To view the data for a content part, click **Show Details** for the content part.

To save the data that makes up the content parts to a .zip file, click **Save to Disk**. Within the .zip file is one file for each content part. To view the contents of an encrypted XML document, open the file in a text editor.

To export the table of content parts to a .csv file, click **Export Table**, select the character encoding for the exported data, and click **Export**.

## Working with Document Comments

Click the Comments tab. The tab shows the comments that are associated with the document.

You can add a comment or edit a comment that is associated with the document. For example, if multiple users are responsible for handling documents that have processing errors, you might want to add comments to indicate that you are working on resolving an issue and the steps that you have taken.

When you add or edit a comment, Trading Networks creates an activity log entry with the activity class **Comments**. Before Trading Networks updates the comment, it stores the previous comment in this activity log entry in a **Full Message** field. It then adds a new **Full Message** field containing

the new or edited comment. Trading Networks also records the user name of the user that updated the comment in the **User Name** field.

To add or edit a comment, click **Edit Comment**, type the comment, and click **Save Comment**.

## Working with Delivery and Service Execution Tasks

Click the Tasks tab. The tab shows the tasks that are associated with the document. For descriptions of the columns, instructions on viewing task details, and information actions you can take, see [“Managing Tasks” on page 35](#).

## Working with Activity Log Entries

Click the Activity Log tab. The following table describes the columns on the tab:

| Column               | Description  |
|----------------------|--|
| <b>TYPE</b>          | Severity level of the entry.   |
| <b>TIMESTAMP</b>     | Time the entry was written to the activity log.  |
| <b>BRIEF MESSAGE</b> | Short message that identifies the type of message in the entry. Click <b>Click to view details</b> to view the full message.   |
| <b>CLASS</b>         | Type of activity that caused the entry to be written. For a list of the activity classes, see <a href="#">“Activity Log Query Fields” on page 26</a> .   |
| <b>USER NAME</b>     | User name of the current user when the activity occurred.<br><br>For example, when a Trading Networks client sends a document to your Integration Server to be processed, and the client was authenticated by your Integration Server, it either supplied a user name and password of a user account or presented a client certificate. In this case, <b>User Name</b> is the user name that the client supplied or the value from the client certificate that represents the user name. |
| <b>PARTNER ID</b>    | Corporation name of the partner associated with the entry.   |

To delete activity log entries, select the check boxes for the entries and click **Delete**.

## Viewing Related Documents

To view related documents for a document, click **Click to view related documents** for the document in the search results. Trading Networks displays the details below the search results, in the Related Document panel.

### Note:

When related documents for a document are EDI documents, Trading Networks identifies the related EDI documents by their control numbers by default. You can choose to identify the

related EDI documents by their relationship labels instead. For example, if you view an ANSI X12 envelope, Trading Networks would identify the envelope's related group with the relationship label Envelope - Group. To make this change, set the `EDIUseNewRelationshipLabel` flag to true (see the *webMethods Module for EDI Installation and User's Guide*).

To view the details for a related document, click  for the related document.

To go back to the document for which you are viewing related documents, click **Link to the referring Transaction**.

## Resubmitting a Document

---

When you resubmit flat file documents, consider the following:

- Trading Networks needs to know the document gateway service to which to resubmit. Confirm the following with the Trading Networks user who set up the gateway service:
  - This information must already have been set by the gateway service when Trading Networks originally received the document. The gateway service must have set the `$receiveSvc` variable within the `TN_parms` variable in the pipeline (`/Tn_parms/$receiveSvc`) to the fully-qualified service name of the gateway service.
  - When you resubmit the document, if `$receiveSvc` was set to the gateway service, Trading Networks invokes that gateway service. If `$receiveSvc` was not set, Trading Networks sends the document to `wm.tn:receive`, which does not properly recognize the flat file document. As a result, the sender, receiver, and document type will all be unknown, and the resubmission of the flat file document will fail.
- When you resubmit a document, Trading Networks resubmits a new instance of the document. If you edit the resubmitted document, Trading Networks makes the changes to the new instance of the document; the original document remains unchanged
- The **Retrieve SenderID from session** option in a flat file document type might not work as you expect. The option tells Trading Networks to use the active user as the sender of the flat file document. When you resubmit, you are the active user, not the original sending partner. As a result, processing might not proceed as you expect. For example, Trading Networks might not select the processing rule that you expect if it uses the sender criteria because the active user that is designated as the sender is not a partner.

### > To resubmit a document

1. Address the issue that is causing you to resubmit the document. For example, if the document did not match any defined document type when it was originally received, create or modify a document type definition to match the document when you resubmit it.
2. Search for the document to resubmit (see [“Finding Documents, Tasks, and Activity Log Entries” on page 19](#)). To search for documents that were processed but encountered errors in the recognition process, use the **Processing Status** query field to search for documents that have the DONE W/ ERRORS processing status.

3. If you need to edit the document, do the following:
  - a. **Click to view details** for the document in the search results.
  - b. In the Transaction Details panel, click the Content tab.
  - c. Click **Show Details** for the content part to update.
  - d. Click **Edit for Resubmit** and edit the file.
4. In the search results, select the check boxes for the documents to resubmit.
5. Click **Resubmit**.

## Reprocessing a Document

### **Important:**

If you reprocess a document for which custom attributes were not saved, you might get unexpected results. If the attributes were not saved, the document will not match processing rules that use extended criteria. Instead, the document will match another processing rule, such as the default processing rule, and Trading Networks will perform the processing actions defined in that rule.

### **> To reprocess a document**

1. Address the issue that are causing you to reprocess the document. For example, if the document did not trigger the correct processing rule when it was originally received, create or modify the processing rules so the document will trigger the correct rule when you reprocess it.
2. In the document search results, select the check boxes for the documents to reprocess.
3. Click **Reprocess**.



# 5 Managing Tasks

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## Viewing Tasks

Search for tasks using the instructions in [“Finding Documents, Tasks, or Activity Log Entries Using a Advanced Search”](#) on page 21. Trading Networks displays the information listed in the following table:

| Column  | Description   |
|---|---|
| <b>TIME CREATED</b>   | Time the task was created.  |
| <b>TASK STATUS</b>  | See Task Status in <a href="#">“Task Query Fields”</a> on page 24.  |
| <b>RETRIES</b>  | Number of times Trading Networks has tried to deliver the document or execute the service.  |
| <b>RETRY LIMIT</b>  | Maximum number of times Trading Networks will try to deliver the document or execute the service.   |
| <b>RETRY FACTOR</b>   | Factor used to calculate how long Trading Networks is to wait before making second and subsequent attempts to deliver the document or execute the service. The time to wait is the last wait time multiplied by <b>Retry Factor</b> . |
| <b>DELIVERY METHOD</b>  | Delivery method Trading Networks is using to deliver the document.  |
| <b>TASK TYPE</b>  | Type of task (delivery or service execution).   |
| <b>QUEUE NAME</b>   | For a scheduled delivery task, name of the scheduled delivery queue.  |
| <b>RECEIVER</b>   | For delivery tasks, corporation name of the partner that is to receive the document that is associated with the task.   |
| <b>TRANSPORT STATUS</b>   | Status of the service for a delivery task.  |
| <b>Icon</b>   | <b>Means that Trading Networks...</b>   |
|  | Has completed the delivery task successfully. Point to the icon to view the transport status message.   |
|  | Has failed to complete the delivery task. Point to the icon to view the transport status message.   |
|   | Is awaiting completion of the delivery task that is in one of the following statuses:   |
|   | <ul style="list-style-type: none"> <li>■ <b>QUEUED</b></li> <li>■ <b>HELD</b></li> <li>■ <b>DELIVERING</b></li> </ul>   |

| Column | Description  |
|--------|--|
|        | <p><b>Note:</b><br/>No icon is displayed for the delivery task that is in one of the preceding statuses.</p> |

To view detailed information for a task, click **Click to view details** for the task in the task search results and view the Task Details and Pipeline tabs. The Pipeline tab displays any pipeline variables and values that are associated with the task, as listed in the following table:

| Task Type         | Information Displayed  |
|-------------------|--|
| Delivery          | Service output returned from the last attempt to deliver the document. |
| Service execution | Return values from the last execution of the service.                  |

To view the document that is associated with the task, click **Click to view associated transaction** for the task in the task search results. For a description of information displayed for documents, see [“Managing and Tracking Documents” on page 29](#).

## Stopping a Task

To stop an immediate delivery task or service execution task, select the check box for the task in the task search results and then click **Stop**.

To stop a scheduled delivery task, ask an administrator to disable or suspend the queue in which the task resides.

## Restarting a Task

You can restart tasks that started on any Integration Server to which My webMethods currently has an open session. When you restart a task, Trading Networks resets the task status to PENDING and the retries value to 0.

**Note:**

If you are working in the archived database, you cannot restart delivery tasks that are in HELD status.

You can restart an immediate delivery task or service execution task whose status is STOPPED or FAILED. If the task status is FAILED, first resolve the problem that caused the failure. To restart an immediate delivery task or service execution task, select the check box for the task in the task search results and click **Restart**.

To restart a scheduled delivery task, ask an administrator to re-enable the queue that was previously disabled or suspended.

## Deleting a Task

---

Trading Networks automatically deletes a task when the document that is associated with the task is archived or deleted. If you do not use the archive and deletion feature, you can manually delete tasks.

You might want to delete tasks whose status is **DONE** because the documents have already been successfully delivered or the services have already been successfully executed. You might also want to delete tasks whose status is **FAILED** if you cannot correct the problem or do not want Trading Networks to try again to deliver the document or execute the service.

To delete a task, select the check box for the task in the task search results and then click **Delete**.

## Reassigning a Task

---

Each task is associated with the host Integration Server on which it started. You might want to reassign a task if you have a clustered environment and want to reassign a task to another server in the cluster, or if for some reason you can no longer use Integration Server on which a task started.

Whether you can reassign a task depends on the task's status and the status of the Integration Server on which the task is currently running. If the Integration Server is running, you can reassign tasks whose status is **STOPPED**, **HELD**, or **FAILED**. If the Integration Server is not running, you can reassign tasks whose status is **NEW**, **PENDING**, **HELD**, **STOPPED**, or **FAILED**.

**Note:**

When reassigning a task, Trading Networks invokes the `wm.server:connect` and `wm.server:ping` services. By default, these services are protected by the Anonymous ACL. If an administrator updated the Anonymous ACL or use a different ACL to protect these services, Trading Networks might be unable to reassign tasks.

### > To reassign tasks

1. Select the check box for the task in the task search results.
2. Make sure the Integration Server to which you want to reassign the task is running.
3. Click **Reassign**. Trading Networks displays the **SPECIFY SERVER FOR REASSIGNMENT OF TASKS** dialog box.
4. In the **Target Server** field, type the host machine name for the Integration Server to which to reassign the task.

# 6 Viewing APIs

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## Overview

You can enable business-to-business communication between trading partners using Application Programming Interfaces (APIs). In addition to exchanging XML, EDI, flat files documents and so on, partners can invoke the exposed APIs to exchange information. These APIs are available by associating Trading Networks with a webMethods API Gateway instance. A partner can access the APIs that appear in the Partner Profiles and the associated Partner Groups pages. The API access key and the authentication mechanism to access the APIs also appear on the APIs tab of the Partner Profiles page. An Administrator can provide a user to view and edit permissions to add or delete the appearance of an API in the Partner Profiles page. If you are unable to view an API despite having appropriate permissions, contact the Administrator to configure a valid API Gateway instance. You must also have a basic understanding of APIs and must know how to access them.

For information on how to invoke an API, see the *webMethods API Portal Consumer's Guide*.

## Viewing API Details in a Partner Profile

**Prerequisites:** You must have access to at least one API to view the API details. If there is a need for your access other APIs, contact your Administrator to gain access.

You can view the details of an API that is accessible to a partner in the APIs tab of the Partner Profiles page.

### > To view the details of an API in a Partner Profile

1. In My webMethods Server: **Applications > Administration > B2B > Partner Administration > Partner Profiles**.
2. Click a partner profile, and click **APIs** to view the list of APIs accessible to the partner.
3. Click  of an API to view its details.

The following table describes the various tabs and the details:

| Tabs                     | Tab Details and Description  |
|--------------------------|--|
| <b>Basic Information</b> | The basic API details. <ul style="list-style-type: none"> <li>■ <b>API Name</b></li> <li>■ <b>API Description</b></li> <li>■ <b>API Version</b></li> <li>■ <b>Maturity State</b></li> <li>■ <b>Gateway Endpoint</b></li> </ul> |

| Tabs                         | Tab Details and Description  |
|------------------------------|--|
|                              | <ul style="list-style-type: none"> <li>■ <b>OData Version</b> (for OData API only)</li> </ul> <p>For information on these API details, see the <i>webMethods API Portal Consumer's Guide</i>.</p>  |
| <b>REST API Details</b>      |  |
| <b>Specifications</b>        | <p>The standard specification format defined for the REST API. The supported specification formats for REST API are:</p> <ul style="list-style-type: none"> <li>■ RAML</li> <li>■ SWAGGER</li> </ul>   |
| <b>Access Policy</b>         | <p>The combination of the identification condition and identification types indicating how the API can be accessed.</p> <ul style="list-style-type: none"> <li>■ <b>Identification Condition.</b> The combination in which the identifiers must be used such as AND or OR conditions.</li> <li>■ <b>Identification Types.</b> The identifiers to invoke the API such as an OAuth2 token or API Key.</li> </ul> |
| <b>Resources and Methods</b> | <p>The list of resources or methods available in the API.</p> <p>Click each resource to view the corresponding HTTP methods, along with a summary. Below each of these methods, details such as parameters and response codes appear.</p>  |
| <b>Technical Information</b> | <p>The representation of the API schema.</p> <ul style="list-style-type: none"> <li>■ <b>Name.</b> Name of the object.</li> <li>■ <b>Value.</b> Key and value pairs represented in JSON or XML format.</li> </ul>  |
| <b>SOAP API Details</b>      |  |
| <b>Specifications</b>        | <p>The standard specification format defined for the SOAP API, WSDL.</p>   |
| <b>Access Policy</b>         | <p>The combination of the identification condition and identification types indicating how the API can be accessed.</p> <ul style="list-style-type: none"> <li>■ <b>Identification Condition.</b> The combination in which the identifiers must be used such as AND or OR conditions.</li> <li>■ <b>Identification Types.</b> The identifiers to invoke the API such as an OAuth2 token or API Key.</li> </ul> |
| <b>Operations</b>            | <p>The list of operations available in the API. Operations are displayed along with their type of binding (SOAP 11 , SOAP 12, and other HTTP methods).</p>   |

| Tabs                         | Tab Details and Description  |
|------------------------------|--|
|                              | Expand each method to view details such as input, output, and fault messages.  |
| <b>REST Transformation</b>   | The list of operations exposed as REST resources. Operations are displayed along with the type of binding.   |
| <b>ODATA API Details</b>     |  |
| <b>Specifications</b>        | The standard specification format defined for the OData API, OData.<br><br>This document describes the entity types, entity sets, functions, and actions.  |
| <b>OData Action Import</b>   | The action import element represents an action in an entity model.<br><br>Click each action import to view the resource path, entity type, and the corresponding HTTP methods.   |
| <b>OData Entity-sets</b>     | The entity set element represents a single entity or a collection of entities of a specific entity type in the data model. Click each entity set to view the resource path, entity type, resource parameter details, and the corresponding HTTP methods.               |
| <b>OData Singletons</b>      | Singletons are single entities appear as children of the entity container.<br><br>Click each singleton to view the resource path, entity type, the corresponding HTTP methods, and the navigation properties that allow navigation from an entity to related entities. |
| <b>OData Function Import</b> | The function import element represents a function in an entity model. It displays a list of OData function imports. Click each function import to view the resource path, entity type, and the corresponding HTTP methods.   |

You can invoke any API that you view in the partner profile from API Gateway. For instructions on how to invoke an API, see the *webMethods API Portal Consumer's Guide*.

## Viewing API Details of Each API Type in a Partner Group

**Prerequisites:** Ensure that you have permissions to view a group to view the details of an API that belongs to that group.

You can view the list of APIs that are accessible to all the members of a partner group.

1. In My webMethods Server: **Applications > Administration > B2B > Partner Administration > Partner Groups**.
2. Click a **Partner Group** to view the list of APIs accessible to the group.

For example, consider a group *sampleGroup* which has partners: p1, p2, and p3. Each partner has access to APIs, some common, and different:

p1 has access to api1, api2, api3.

p2 has access to api3 and api5.

p3 has access to api6.

The APIs panel provides a summary of all the APIs to which the partner group members have access without accounting for the specific APIs that each partner can access.

The **APIs** tab for *sampleGroup* displays the following APIs: api1, api2, api3, api5, and api6.

3. Click  next to the API to view the details.



# 7 Managing the Activity Log

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## Viewing Activity Log Entries

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Search for activity log entries using the instructions in [“Finding Documents, Tasks, or Activity Log Entries Using a Advanced Search” on page 21](#). The activity log entries that Trading Networks displays are listed in the table as follows:

| Column               | Description  |
|----------------------|--|
| <b>Type</b>          | Severity level of the entry.   |
| <b>Timestamp</b>     | Date and time Trading Networks added the entry to the activity log.  |
| <b>Brief Message</b> | Shortened version of the full message in the entry.  |
| <b>Class</b>         | Type of activity that caused the entry to be written. For a list of the activity classes, see <a href="#">“Activity Log Query Fields” on page 26</a> . |
| <b>User Name</b>     | User name associated with the activity.  |
| <b>Partner ID</b>    | Corporation name of the partner associated with the entry.   |

To view the full message for an entry, click **View Details**  in the activity log entry search results.

To view the document associated with an entry, click **Click to view associated transaction**  in the activity log entry search results. For a description of information displayed for documents, see [“Managing and Tracking Documents” on page 29](#).

## Deleting an Activity Log Entry

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Trading Networks automatically deletes activity log entries when the document with which the entries are associated is archived or deleted. If you do not use the archive and deletion feature, you can manually delete entries.

To delete an entry, select the check box for the entry in the activity log entry search results and then click **Delete**.

To find a specific document and delete its associated entries, see [“Working with Activity Log Entries” on page 31](#).