

*Phase II:  
Setting Up & Using the  
is.group  
PSN*



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## Setting Up the is.group PSN

Once you have completed the steps in the handout, *Phase I: Setting Up PSN* for any vendor, you can set the is.group-specific parameters. If you have any questions about PSN installation, email them to [ddmssupport@ecisolutions.com](mailto:ddmssupport@ecisolutions.com).

Setting parameters to communicate with is.group involves:

- 1 Creating an is.group customer record.
- 2 Setting up your Vendor database.
- 3 Setting up the communication parameters.
- 4 Setting up your trading partner parameters.
- 5 Setting up your EDI record.
- 6 Testing your system settings.

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**Note:** Do not perform the steps listed here until you have executed the steps listed in the handout *Phase I: Setting Up PSN*. It is available at [www.ddms.com/support/doc/psn.htm](http://www.ddms.com/support/doc/psn.htm).

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To manually assign a customer number, the next customer must be blank.




### Creating a Customer Record

In the Customer Master tab, create a customer with ISG as the account number and IS GROUP as the name. For information on creating a customer, see your online help.

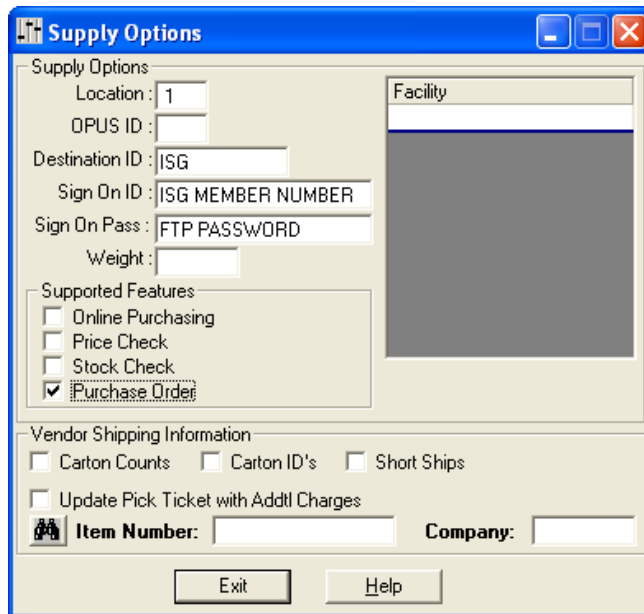
Figure 1: The Vendor Master Tab


## Setting Up Your Vendor Database

You must set up the appropriate destination ID for is.group and select the features to enable.

- 1 Set up is.group as a vendor.
  - 1.1 In the Vendor Master tab, click .
  - 1.2 Click the Vendor # box and type **ISG**
  - 1.3 Click the Name box and type **IS Group**
  - 1.4 Click the Comm box's down arrow. From the menu, click EDI. See Figure 1.
  - 1.5 Click .
- 2 Set PSN parameters.
  - 2.1 Click .
  - 2.2 The Supply Options window opens, as shown in Figure 2. In the Location box, enter a G/L location, or accept the default of 1.
  - 2.3 In the Destination ID box, enter your Supplies Network's ID exactly as follows: **ISG**
  - 2.4 In the Sign On ID box, enter the four-digit is.group member ID provided by your is.group sales representative.
  - 2.5 In the Sign On Pass box, enter the FTP password from is.group.

**Figure 2: The Supply Options Window**




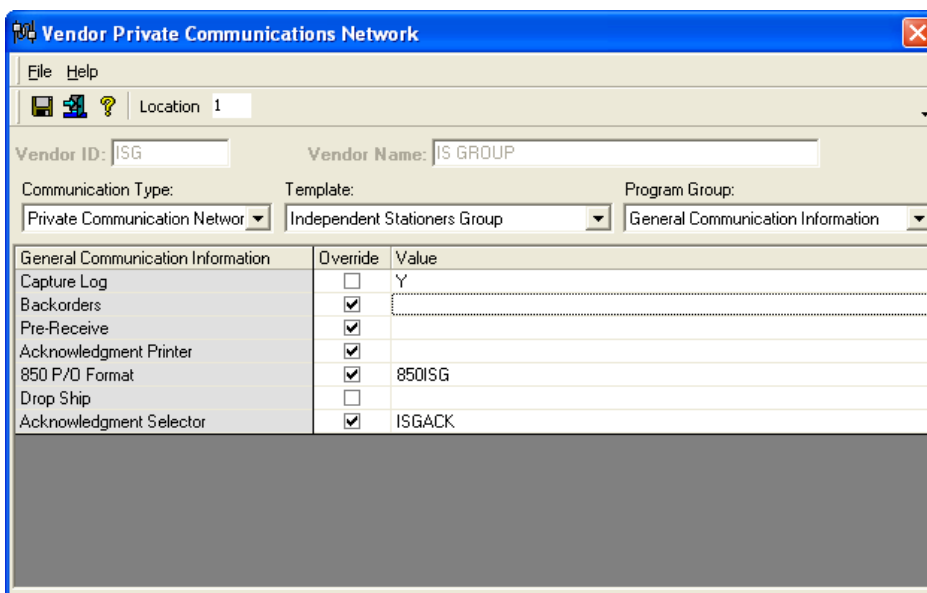
- 2.6 From the Supported Features list, click Purchase Order.
- 2.7 When you finish, click Exit.
- 3 Click .

## Setting Communication Parameters

You must set up communication parameters for is.group.


**Note:** Be very careful when setting communication parameters. Once you've set them, you can't change them without contacting Support.

- 1 Set up the Vendor Private Communications Network dialog box.
  - 1.1 In the Vendor window, select the ISG vendor.
  - 1.2 Open the Vendor Private Communications Network dialog box. To do so, click View and select PCN; press Ctrl + U; or click .
  - 1.3 From the Communication Type drop down list, select Private Communication Network, as shown in Figure 3.
  - 1.4 From the Template drop down list, select Independent Stationers Group.
- 2 Set the general communications parameters in the Vendor Private Communications Network dialog box.
  - 2.1 From the Program Group drop down list, click General Communications Information. The available parameters are listed in the General Communication Information column.



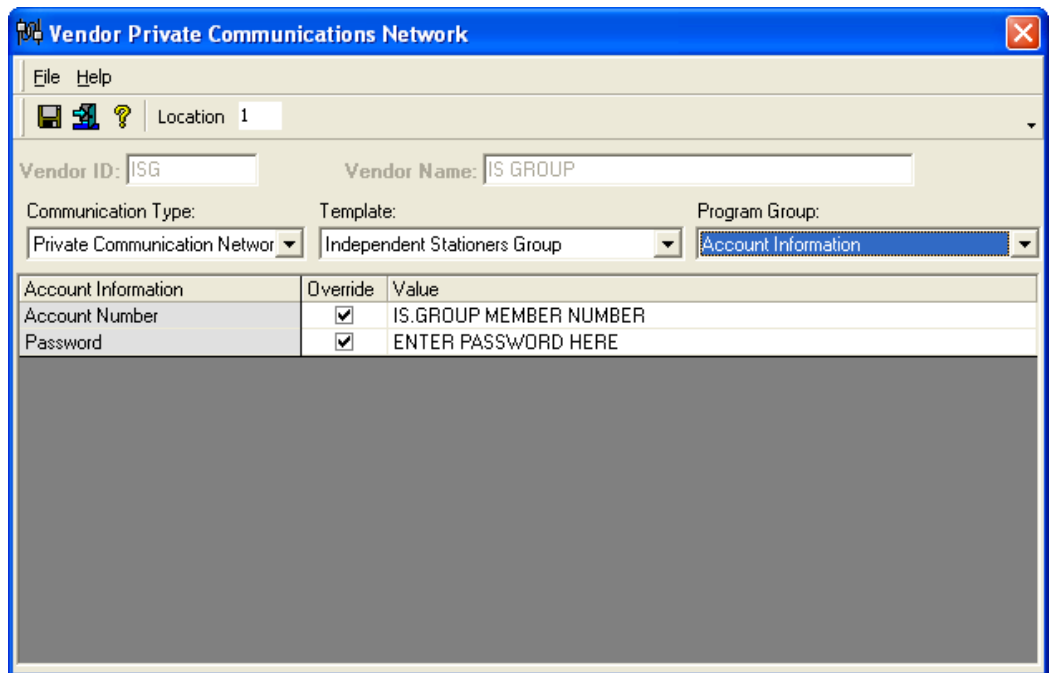
**Figure 3: Setting General Communication Information Parameters**

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- 2.2 Add a default value by entering it in the Value column. For example, to create a capture log file, type **Y** in the Capture Log value box. Check the corresponding Override box to allow these parameters to be changed at the time of communication.  
You may set these as you choose with the following exceptions:
  - 2.3 In the 850 P/O Format Value box, type **850ISG**
  - 2.4 Leave the Drop Ship Value box blank. The default is next-day delivery. Entering information places your order on hold on the is.group side.
  - 2.5 In the Acknowledgment Selector Value box, type **ISGACK**
  - 2.6 When you finish, click .
- 3 Set the account parameters in the Vendor Private Communications Network dialog box. See Figure 4.
  - 3.1 From the Program Group drop down list, click Account Information.


The available parameters are listed in the Account Information column. Add a default value by entering it in the Value column. Check the corresponding Override box to allow these parameters to be changed at the time of communication.

**Figure 4: Setting Account Information Parameters**



Account Information	Override	Value
Account Number	<input checked="" type="checkbox"/>	IS.GROUP MEMBER NUMBER
Password	<input checked="" type="checkbox"/>	ENTER PASSWORD HERE

You may set these as you choose with the following exceptions:

- 3.2 In the Account Number Value box, enter the four-digit is.group member ID provided by your is.group sales representative.
- 3.3 In the Password Value box, enter the FTP password provided by is.group.
- 3.4 When you finish, click .

*When working in any text-based screen, remember to use your Caps Lock key.*

## Setting Up Trading Partner Parameters

To set up your trading partner parameters:

- 1 In the DDMS Master Menu, double-click  , then double-click



- 2 The (S) Purchase Order Selectors screen opens. Type ? in the Selector field and press Enter.
- 3 Quickly type **SG** at the Program Selection prompt, . (If you type it too slowly, the (S) screen reopens.)
- 4 The (SG) EDI Communications screen opens. In the Action field, type **A**. See Figure 5.

**Figure 5: The (SG) EDI Communications Screen**

```

11:17:26          (SG) EDI Communications Screen rev. (03/21/08)          11/04/08
=====
Processing Functions :
(A) Set Up Trading Partner Parameters
(B) Build For Transmission (L) Background Build
(C) Process Received File
(K) Build P/O File For Sharp          File [P-MASTER ] Vol. [SR??]
Communication Functions :
(D) Send Files                      Transaction Set to Process [.....]
(E) Receive Files
(F) Interactive Mode                Acct #..... Dept :....
(G) Purge Records                  Name :.....
(H) Fax File                        .....
(I) Fax Purchase Orders            .....
(J) Pricing Matrix                  .....
(T) Transaction Monitor
P/O #[.....] To [.....] Invoice #[.....] To [.....]
Vndr#[.....] To [.....] Cust #[.....] To [.....]
Vendor Code [.] To [.] Auto Group [...]
File Name [.....] Vol. Ser. [W2 ]

Action [A]          Location [..] Line [M1] Printer [P1] Copies [ 1]
=====
  
```

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- 5 In the (SGA) screen, type **C** in the Action field.
- 6 Tab to the Account # field and type **ISG** and press Enter.
- 7 At the Correct Record prompt, press Enter.
- 8 Tab to the Interchange ID Qualif field and type **ZZ**
- 9 In the ID field, type **ISGROUP**
- 10 Tab to the Interchange Control Std field and type **U**
- 11 In the Version field, type **00400**
- 12 In the Receivers Code Id field, type **ISGROUP** and press Tab.
- 13 In the Responsible Agency Code field, type **X**
- 14 In the Version field, type **004030**
- 15 Tab to the Test Indicator field and type **P**
- 16 Tab to the Seg Term field and type **~~**, as shown in Figure 6.

**Note:** The tilde (~) key is located in the upper left corner of most key-boards.

- 17 In the Interchange Control field, type **50103** and press Tab.
- 18 In the Group Control field, type **500103** and press Enter.

**Figure 6: The (SGA) Trading Partner Parameters Screen**

```

11:19:03          (SGA) TRADING PARTNER PARAMETERS REV. (06/13/03)          11/04/08
-----
Action [C] ( C=Chg, D=Del, I=Inq, R=Ref Codes)
-----
Name :                               Account #           1 Dept :
                               KELLER                    TX
                               817- -
-----
EDI VAN :
Interchange ID Qualif :ZZ ID :ISGROUP          Auto Send           : (Y/N)
Auth. Info Qualif.   : Info :                 Negate Credit Inv.  : (Y/N)
Security Info Qualif. : Info :                 Use Received Price  : (Y/N)
Interchange Control Std:U Version :00400        Using 810           :
Receivers Code Id    :ISGROUP                 Using 855           :
Responsible Agency Code:X Version :00403      Auto Create Orders :Y (Y/N)
Interchange Control#  50103                    Sales Auto Group   :AOP
Group Control #      500103                    Auto 850 Sendfile  :
                                           Default Selector   :
                                           ===== Shipping Info =====
                                           | Contract #
                                           | Delivering Dlr #
                                           | Contracting Dealer #
                                           | 2nd Party Delivery :
-----
Test Indicator :P (T/P) Buy Unit:S (S/M/W)
Acknowledgement :N Customer Ref :
Release/Contract: 1: 2:
Round Quantities when Needed U/D/R ? Seg Term:~~
-----
** ENTER DATA OR <?> FOR HELP !!

```

## Setting Up the EDI Record

If you already have information in the EDI record of the (L6WB) screen, contact is.group. They need this information. **Enter information in the (L6WB) screen only if the EDI record is blank.**



- 1 In the DDMS Master Menu, double-click , then double-click



. In the Parameter Editor window, double-click Text Base Pa-

rameters to access the (L) Parameters screen.

- 2 In the (L) Parameters screen, type **6** in the Selection Code field.
- 3 The (L6) Vendor and Wholesaler Communications screen opens. Type **W** in the Selection Code field. The (L6W) EDI Communications screen opens.
- 4 In the (L6W) screen's Selection Code field, type **B**
- 5 The (L6WB) screen opens. See Figure 7.
  - If your (L6WB) screen already has parameters set, go to **Step 8**.
  - If your (L6WB) screen is blank, tab to the Qualifier field and type **ZZ**
- 6 In the ID and Code fields, enter your 10-digit business phone number.
- 7 Press Enter to save your changes.

*Do NOT enter any information in the (L6WB) screen unless it is blank.*

**Figure 7: The (L6WB) AT&T EDI IMS Parameters Screen**

```

11:22:53                AT&T EDI IMS Parameters                11/04/08
-----
Modem Parameters                EDI Parameters
-----
Hayes Only ?                Capture Log ? (Y/N)                Code :00
Prefix ?9,                Reliable ?Y                Logon Id :OPD000004
Phone Nbr #18003520192                Baud :9600                Password :DDMS.OPUS
Qualifier :ZZ
Id :6203017821
Code :6203017821
File Type :11
Backorders ::1 (SA = NO B/O)
(SS = B/O)
-----
Location
1 [ ]
2 [ ]
3 [ ]
4 [ ]
5 [ ]
-----
    
```

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- 8 Email [edi@isgroup.org](mailto:edi@isgroup.org). Include a screen print, your member number, ID, qualifier, and code.

### Testing Your System Parameters

After completing the is.group PSN communications setup in DDMS and making any necessary changes to your DDMS inventory database, you are ready to run two communications tests.

For the first test, a test purchase order is used to verify the address coming from your DDMS system.

- Create a small single-line purchase order for 1 CT (or 5 BX) SMD10330. (Do not order any other items.)
- Transmit this purchase order via the is.group PSN. For instructions, see **Using PSN**.
- The is.group system does not send an acknowledgment for this test P/O. Your system may keep polling for acknowledgments. You may exit the screen as soon as it completes the test P/O transmission.
- Email [edi@isgroup.org](mailto:edi@isgroup.org) to inform them of the P/O# you sent.
- Do not place any other orders via the is.group PSN unless requested by ISG staff.
- The is.group contacts you when address verification is complete or to discuss any additional actions that may be required. Please wait for a response from is.group.
- When this initial test is complete, delete the test P/O from your Purchasing application screen. The is.group does not accept duplicate P/Os.

For the second test, a test purchase order is used to verify receipt and acknowledgments.

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**Note:** Do not place the second test order until is.group says you should.

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- Create another small single-line purchase order for 1 CT (or 5 BX) SMD10330. (Do not order any other items.)
- Transmit this purchase order via the is.group PSN. For instructions, see **Using PSN**.
- Request an acknowledgment. For instructions, see **Requesting Acknowledgments**.

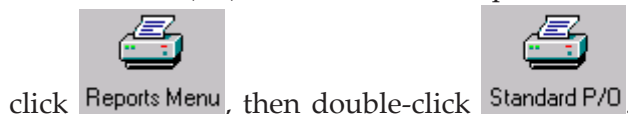
If you have problems with the transmission or with the acknowledgment, first get a verbal confirmation that is.group received the transmission, and then contact ECi Technical Support.

## Using PSN

After building a P/O, you can transmit it online to is.group. For instructions on transmitting P/Os using DDMS, see your online help. To transmit P/Os using text-based software:

- 1 In the (SR) Purchase Order Reports screen, type **B** in the Request field.

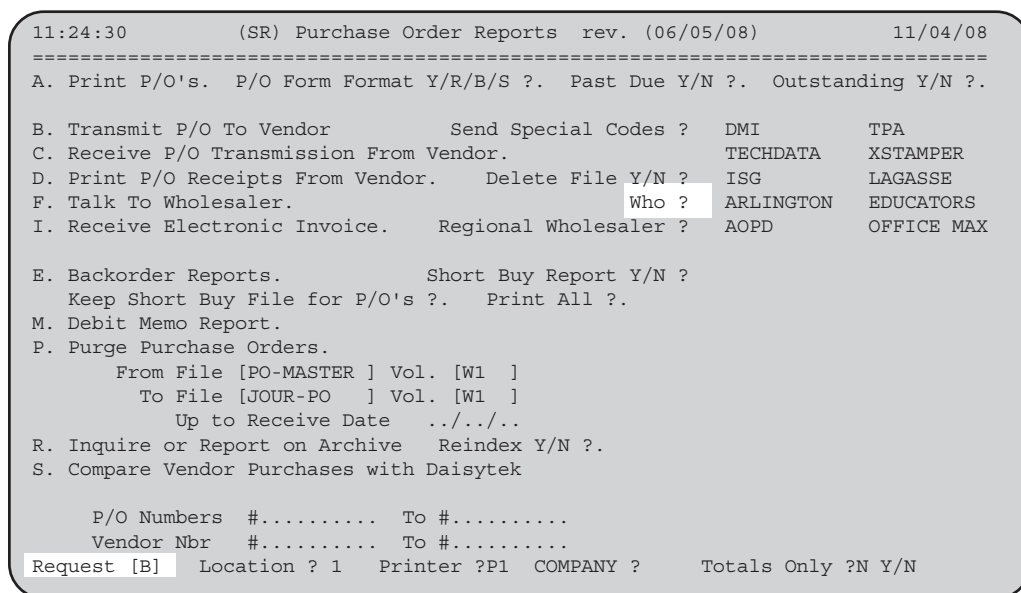
**Note:** To access the (SR) Purchase Order Reports screen in DDMS, double-



- 2 Tab to the Who field and type **N** to select ISG. See Figure 8.
- 3 In the P/O Numbers field, enter the number of the P/O to send. To send more than one P/O, enter the number of the first P/O in the P/O Numbers field. Enter the number of the last P/O in the To # field.
- 4 Press Enter until the Are You Sure prompt appears. Type **Y**
- 5 You can complete the transmission using the (CX) screen. See **Completing the Transmission**.

**Note:** Once your P/O is successfully transmitted, wait 30 to 45 minutes, then request an acknowledgment. For instructions, see **Requesting Acknowledgments**.

**Figure 8:**  
Transmitting  
P/Os Online



## Completing the Transmission

Once you've completed the (SR) screen, the (CX) screen opens.

**Note:** Do not change the shipping or billing information without first contacting is.group ([edi@isgroup.org](mailto:edi@isgroup.org)). Shipping and billing information is used as account verification.

*The P/O is sent to the vendor matching the Vendor ID on the P/O.*

- 1 At the Enter Number For Selection prompt, type **C** to complete the transmission. See Figure 9.
- 2 The P/O is transmitted to is.group.

## Requesting Acknowledgments

Thirty to forty minutes after transmitting a P/O, you can request an acknowledgment from is.group.



**Note:** To access the (SR) screen in DDMS, double-click **Reports Menu**, then



double-click **Standard P/O**.

- 1 In the (SR) screen, type **C** in the Request field.
- 2 At the Are You Using Private Supply Network query, type **Y**

**Figure 9:**  
Completing the Transmission

```

14:25:25 Vendor Private Communication Network Rev. (02/07/03) 10/27/03
=====
ACTION [ ] A=Add, C=Change, I=Inquire Location [ 1]
=====
Vendor#_____ Code :_ G/L #___-__
Comm. Type Template Parameter Group
[PCN ] [ISG ] [General Communication Information ]
Parameter
[Drop Ship ] 1-20 [ ]
Override [Y] 21-40 [ ]
41-60 [ ]
0 [Backorders ] 61-80 [ ]
1 [Pre-Receive ]
2 [Acknowledgment Printer ]
3 [Shipping Code ]
4 [Drop Ship ]
5 [Acknowledgment Selector ]

=====
Enter Number for Selection "C" - Complete, "A" - Abort [C]
    
```

- 3 The (SRC) Acknowledgment Request screen opens. Tab to the Vendor # field and type **ISG**. Press Enter. See Figure 10.
- 4 At the Correct Record prompt, press Enter.
- 5 At the Get All Available Acknowledgments For This Vendor prompt, type **Y**
- 6 Each P/O's status appears in the Status field next to the PO Nbr field. If the status is one of the following, go to **Step 7**.

- N** The order has not been pre-received.
- F** The vendor has shipped your order.
- P** The vendor has allocated inventory to fill your order.

If the status field is blank or is set to ? (question mark), the P/O you requested was not found. Repeat Steps 3 - 5. If the record is still not found, call your vendor for a verbal acknowledgment. Your order may not have been transmitted.

- 7 At the Get Acknowledgment prompt, type **Y**

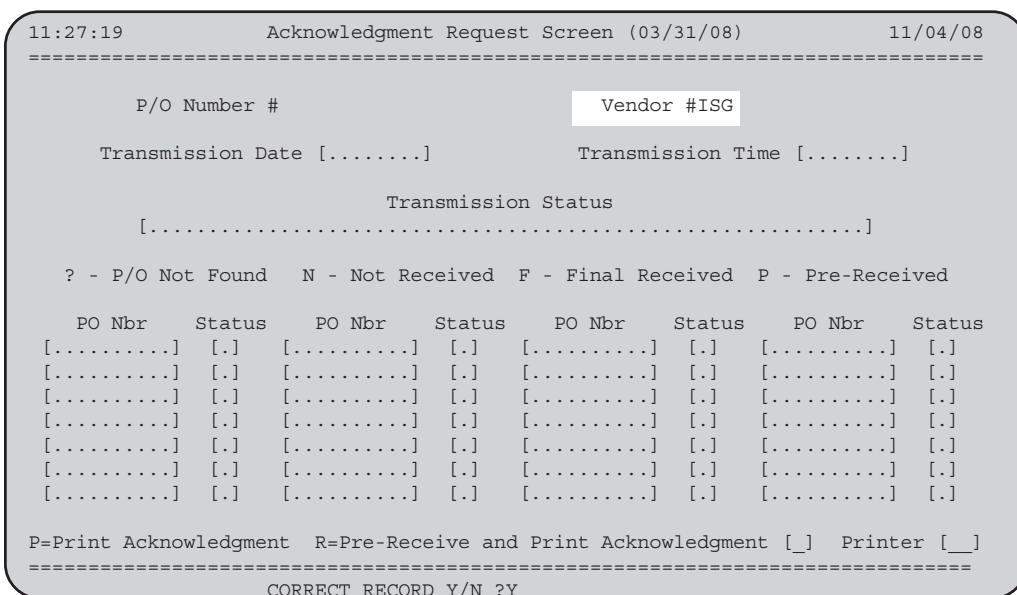
To pre-receive and/or print the acknowledgment:

- 1 Use the fields at the bottom of the screen, shown in Figure 11, to print an acknowledgment or pre-receive a P/O.

To pre-receive a P/O and print an acknowledgment, type **R**

To print an acknowledgment, type **P**

**Figure 10: The (SRC) Acknowledgement Request Screen**



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**Note:** If you don't know if your order has been received, try to pre-receive the order while you print the acknowledgment. You can only pre-receive once, but you can print an acknowledgment as many times as necessary.

---

- 2 In the Printer field, enter the name of the printer to use.
- 3 At the Are You Sure prompt, type Y

### Purging Acknowledgments

You can clear acknowledgments from the Acknowledgment report (printed using the (SR) [C] program).

- 1 In the (SG) EDI Communications screen, type G in the Action field.
- 2 In the Purge Type field, type V
- 3 At the Are You Sure prompt, type Y

**Figure 11:**  
**Printing and**  
**Pre-Receiving**  
**an**  
**Acknowledgement**

```

11:27:19                Acknowledgment Request Screen (03/31/08)                11/04/08
=====
P/O Number #                Vendor #ISG
Transmission Date [.....]    Transmission Time [.....]
                                Transmission Status
                                [.....]
? - P/O Not Found  N - Not Received  F - Final Received  P - Pre-Received

PO Nbr   Status   PO Nbr   Status   PO Nbr   Status   PO Nbr   Status
[.....]  [.]    [.....]  [.]    [.....]  [.]    [.....]  [.]
[.....]  [.]    [.....]  [.]    [.....]  [.]    [.....]  [.]
[.....]  [.]    [.....]  [.]    [.....]  [.]    [.....]  [.]
[.....]  [.]    [.....]  [.]    [.....]  [.]    [.....]  [.]
[.....]  [.]    [.....]  [.]    [.....]  [.]    [.....]  [.]
[.....]  [.]    [.....]  [.]    [.....]  [.]    [.....]  [.]

P=Print Acknowledgment  R=Pre-Receive and Print Acknowledgment [P]  Printer [__]
=====
CORRECT RECORD Y/N ?Y
    
```