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Making Integrations Simpler

boomi  
Partner



# Fetching EDI Docs from FTP Server and Routing them using Processing Group Component

**Author**

**Sowjanya Gurrala**



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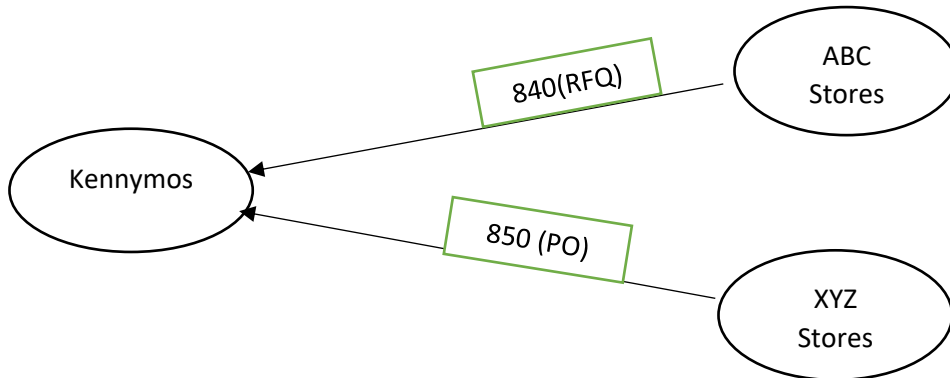
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### Use case:

Develop an inbound Process with one host partner and two remote partners and route the documents to Partner specific sub processes using Processing Group Component. Use the communication method as FTP.

Here the host partner: Kennymos

Remote Partners: ABC Stores and XYZ Stores



## What is FTP?

- File Transfer Protocol is a standard network protocol used for the transfer of files from one host to another over the Internet.
- It's widely used for various purposes including uploading and downloading files and EDI documents.
- FTP supports authentication mechanisms like Username and Password to verify the identity of the user who are accessing the files over the server.
- One of the main reasons why modern businesses and individuals need FTP is its ability to perform large file size transfers.
- In a normal FTP, data is not encrypted. The data will be transmitted as a plain text over the internet.
- By default, it uses port 21.

### FTP Communication Method:

- In EDI we have the ftp communication method which allows the trading partners to send and retrieve the EDI files over the ftp server.
- In order to configure FTP Communication method, first we need to set up an ftp server in cloud or local system.
- In a local system we can set up an FTP Server using FileZilla.

### FileZilla:

FileZilla is a free, open-source file transfer protocol (FTP) software tool that allows users to set up FTP servers or connect to other FTP servers in order to exchange files.

Now set up an FTP Server by installing the FileZilla server.

### Steps to install and configure the FileZilla Server:

**Step1.1:** Open the below link in browser and click on Download FileZilla Server.

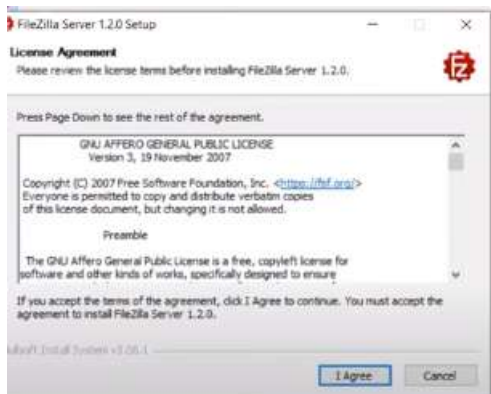
<https://filezilla-project.org/download.php?platform=win64&type=server>



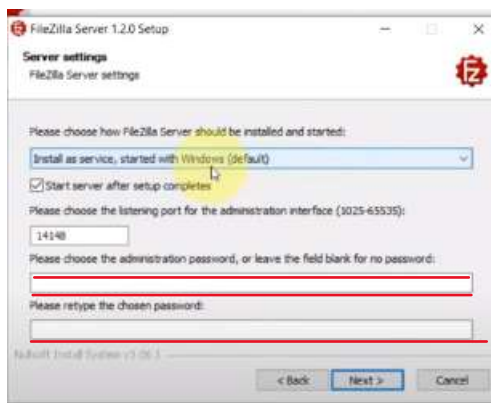
**Step1.2:** Click on the downloaded file and click on Yes



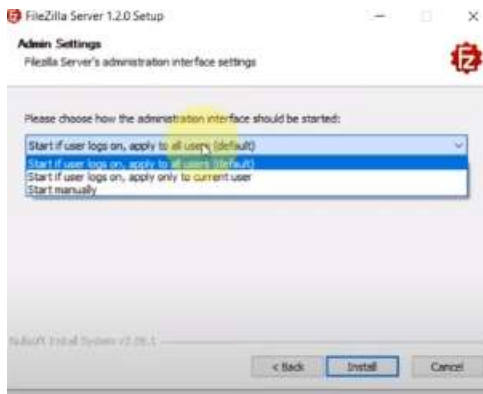
**Step1.3:** Click on I agree.



**Step1.4:** Click on Next button until the below wizard appears. Now type a password in the box which is marked and click on Next.



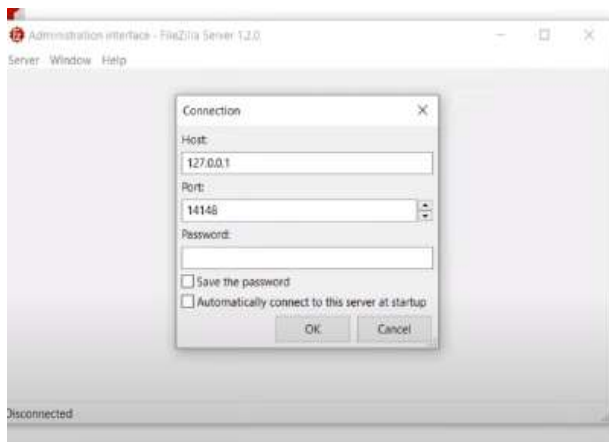
**Step1.5:** Now click on Install to install the server



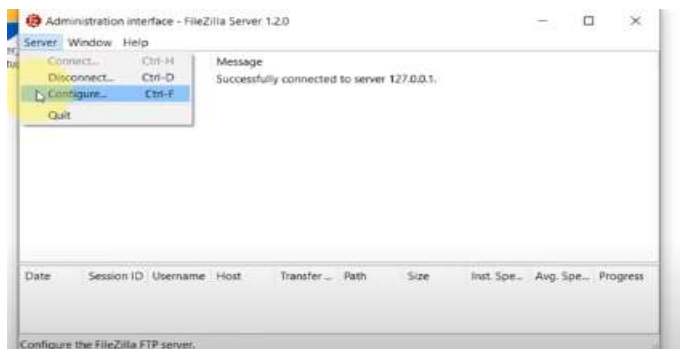
**Step1.6:** click on connect to FileZilla FTP server



**Step1.7:** Enter your password and click on ok



**Step1.8:** Now go to the server tab, click on configure

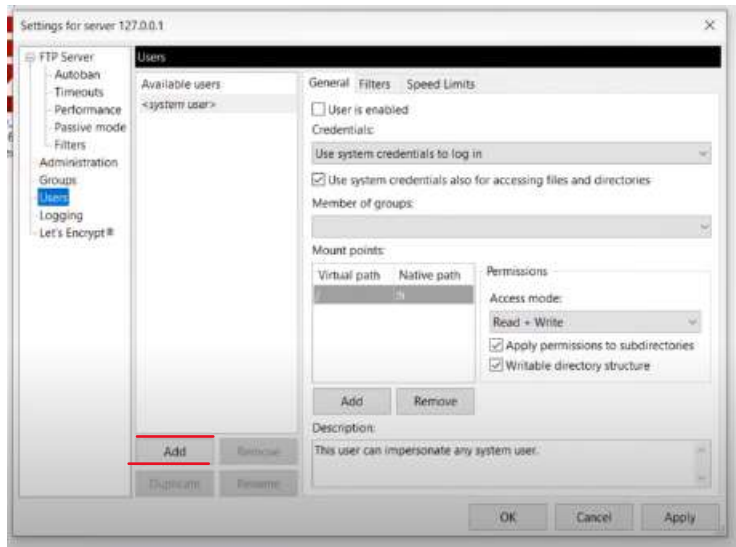


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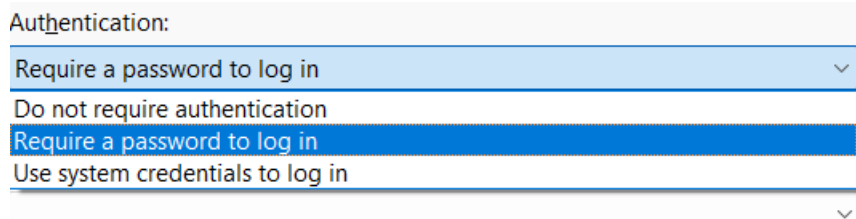
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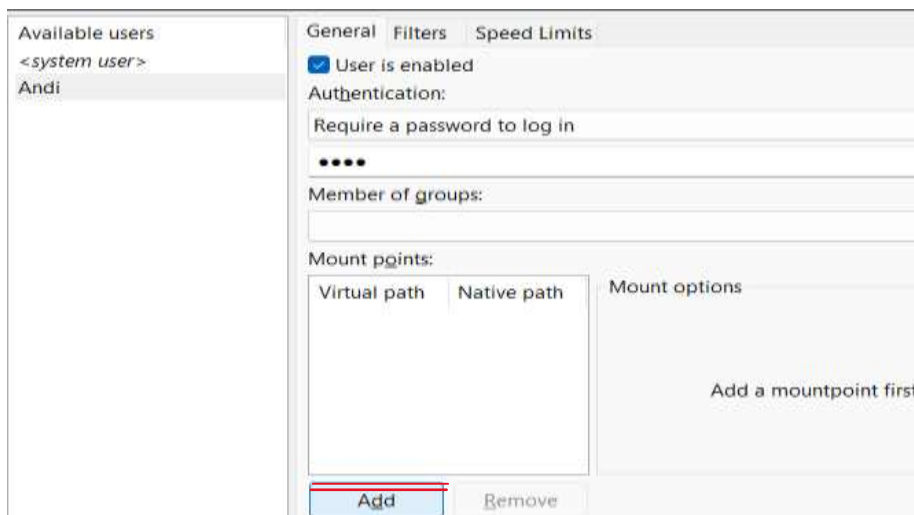
**Step1.9:** A wizard opens as shown below. Now Click on Users and click on Add to add a user.



**Step1.10:** Configure user name and choose Require a password to login under Authentication and type a password which is specific to the user



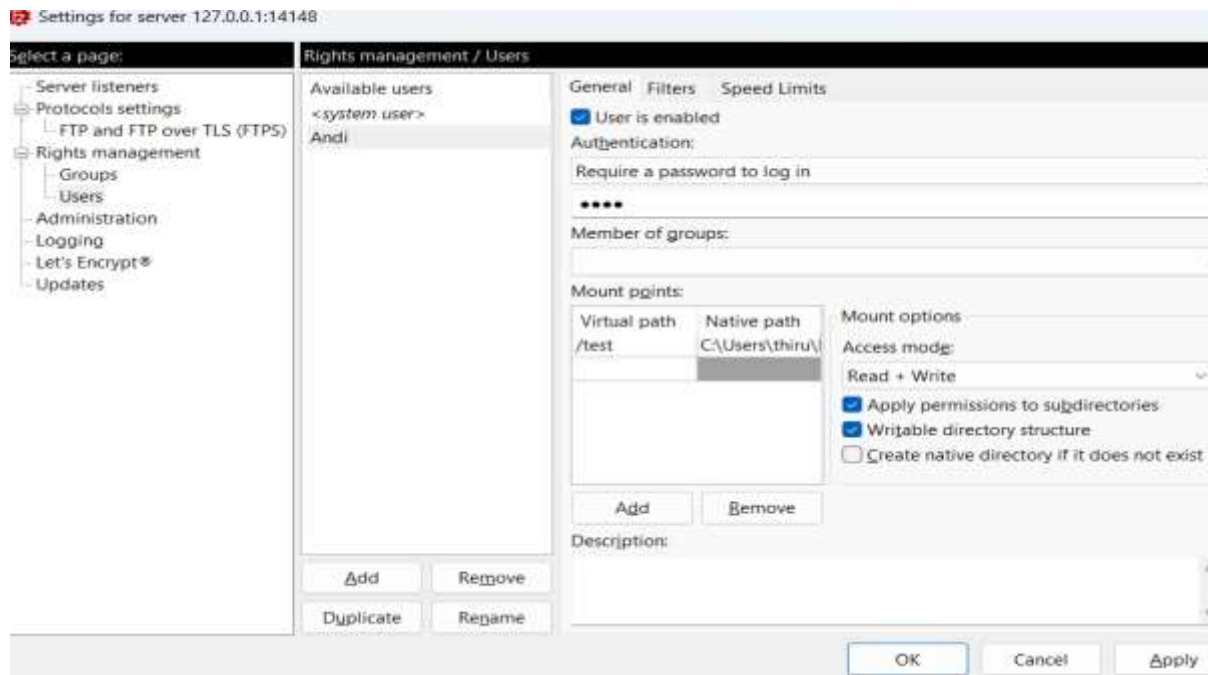
Click on Add to add the path. Configure the Virtual path and Native path.



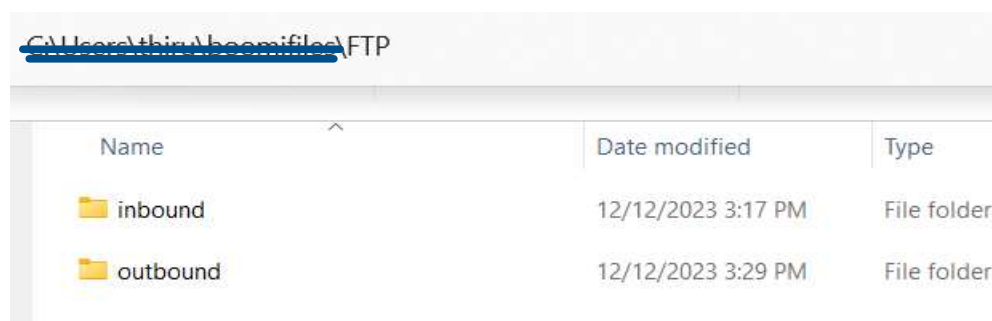
Here Native path is the local directory path and virtual path define the directories the client will see after logging in FileZilla client.

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**Step1.11:** Now the entire configuration will look as shown below. Click on OK to save the changes.



**Step1.12:** Now go to the folder in your local system which you gave in the native path and create 2 subfolders as **inbound** and **outbound**.



**Step1.13:** Place edi 840 and 850 sample documents in outbound folder and leave the inbound folder empty.

(Refer to sample documents for the sample files)





## Sample Documents 840 (Request for Quotation)

ISA\*00\* \*00\* \*ZZ\*ABC123 \*ZZ\*RECEIVERID  
\*YYMMDD\*HHMM\*U\*00401\*000000001\*0\*T\*: ~

GS\*RFQ\*ABC123\*RECEIVERID\*YYMMDD\*HHMM\*12345\*X\*004010~

ST\*840\*0001~

BQR\*00\*INV12345678\*20221231\*1234\*PO123456~

REF\*VR\*123456789~

DTM\*002\*20230110~

N1\*BY\*BUYER NAME\*92\*BUYER CODE~

N1\*VN\*VENDOR NAME\*92\*VENDOR CODE~

IT1\*1\*50\*EA\*12.34\*TE\*UP\*ITEM12345\*IN\*SKU1234~

PID\*F\*\*\*\*\*PRODUCT DESCRIPTION~

IT1\*2\*30\*EA\*8.99\*TE\*UP\*ITEM67890\*IN\*SKU5678~

PID\*F\*\*\*\*\*ANOTHER DESCRIPTION~

CTT\*2~

SE\*10\*0001~

GE\*1\*12345~

IEA\*1\*000000001~

## 850(Purchase Order)

ISA\*00\* \*00\* \*ZZ\*XYZ456 \*ZZ\*RECEIVERID

\*YYMMDD\*HHMM\*U\*00401\*000000001\*0\*T\*: ~

GS\*PO\*XYZ456\*RECEIVERID\*YYMMDD\*HHMM\*12345\*X\*004010~

ST\*850\*0001~

BEG\*00\*NE\*10001234\*\*20230101~

REF\*VR\*123456789~

DTM\*002\*20230110~

N1\*BY\*BUYER NAME\*92\*BUYER CODE~

N1\*SE\*SUPPLIER NAME\*92\*SUPPLIER CODE~

PO1\*1\*50\*EA\*12.34\*TE\*UP\*ITEM12345~

PID\*F\*\*\*\*PRODUCT DESCRIPTION~

PO4\*2\*4\*EA\*PLT\*UP\*12345678901234~

CTT\*1~

SE\*11\*0001~

GE\*1\*12345~

IEA\*1\*000000001~

## Trading Partners Component

- Trading Partners Component is used to conduct Direct EDI or B2B transactions by configuring a host partner (i.e., My Company or Supplier or Vendor) and a remote partner (i.e., the partner that we are trading with or Buyer)
- We have to create separate Trading Partner Component for My Company as well as the partner.

## Configuring Trading Partner Component for My Company (Kennymos)

**Step 2.1:** Log onto the Boomi platform (<https://platform.boomi.com/>) with the required credentials (Email Address and Password).



boomi

Welcome to Boomi

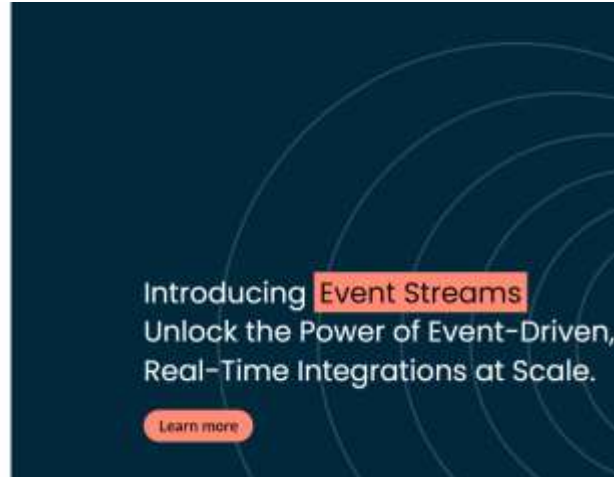
Email Address (required)

An email address is required. Enter a valid email address.

Password (required)

 Show

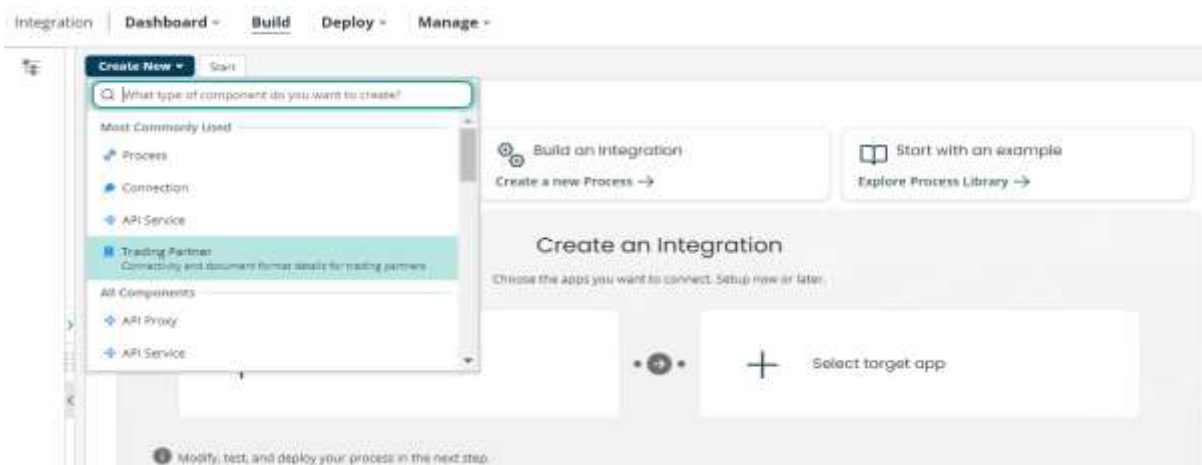
Sign In



**Step 2.2:** Under Services choose Integration



**Step 2.3:** Click on Create new and type Trading Partner in the search box and click on Trading Partner Component.



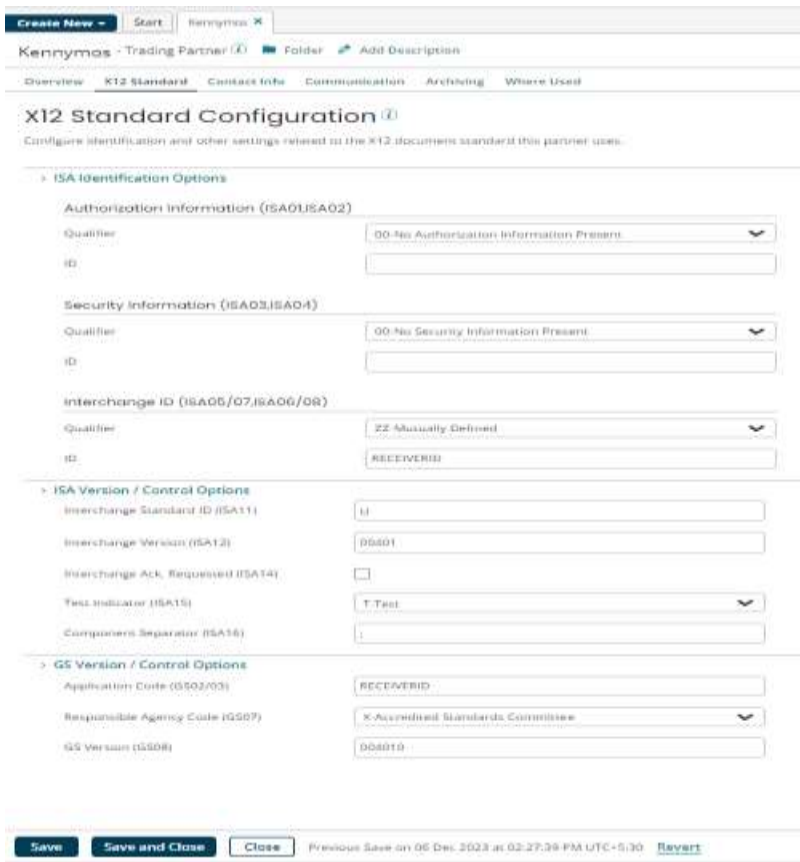
**Step2.4:** Choose the standard as X12 and This is my company option and click on create.



**Step2.5:** configure a proper name for the component as shown below and click on save.



**Step2.6:** Go to X12 tab and configure the ISA and GS control options based on values provided in the sample document and click on save.



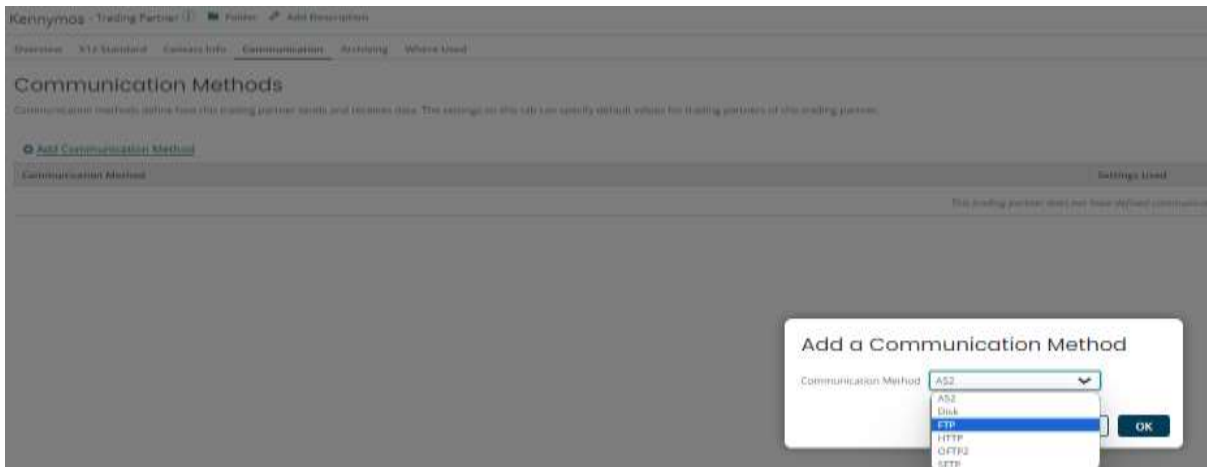
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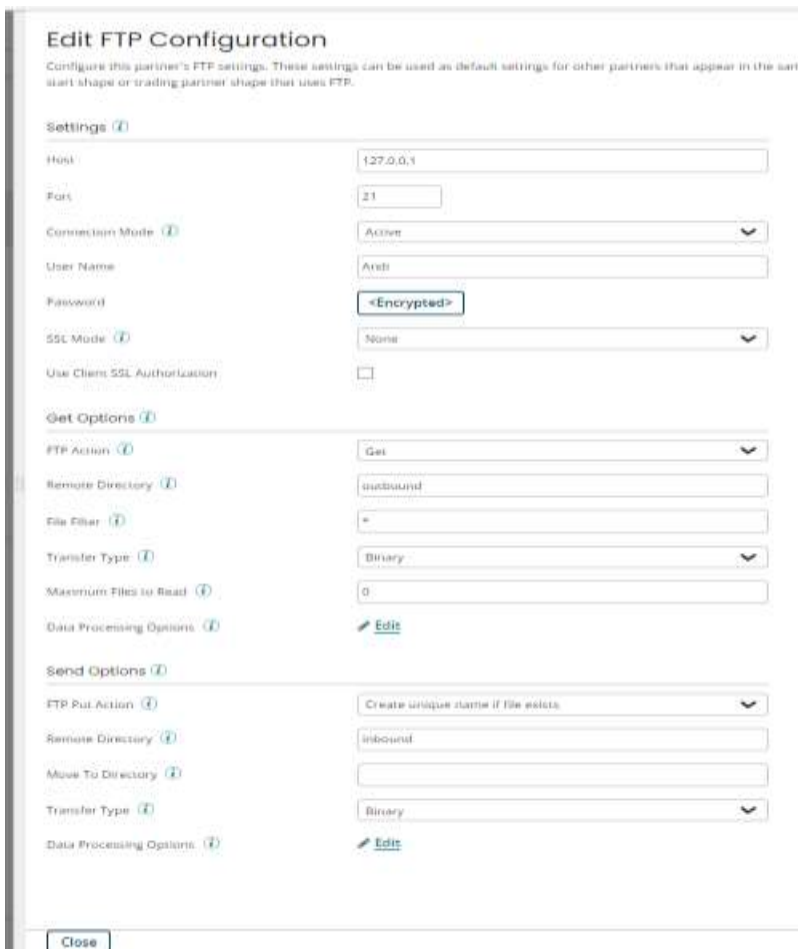


Note: For inbound operation My Company will be the receiver. So, we have to configure ISA07, ISA08, GS03 for ISA and GS control options respectively.

**Step2.7:** Go to communication tab and click on Add communication method and choose FTP.



**Step2.8:** Configure the Get and send details and click on close and save the component.



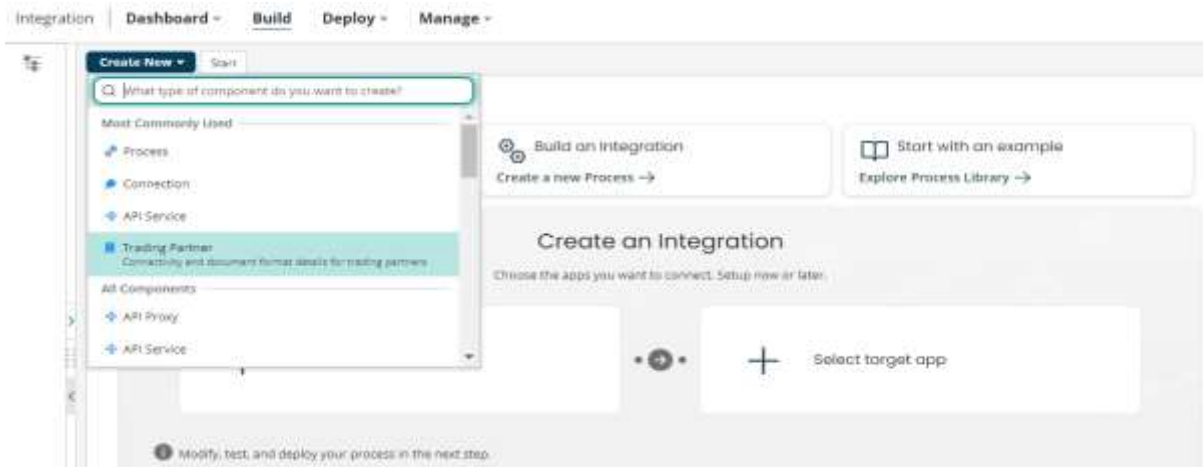
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## Configuring Trading Partner Component for remote Partner (ABC Stores)

**Step3.1:** Click on Create new and type Trading Partner in the search box and click on Trading Partner Component.



**Step3.2:** Choose the standard as X12 and This is a partner that I trade with option and click on create.

### Create Component

Type

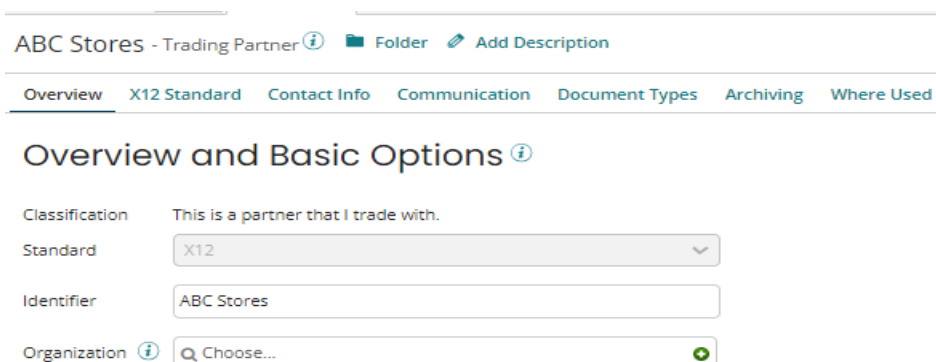
Standard

Options

This is a partner that I trade with.

This is my company.

**Step3.3:** configure a proper name for the component as shown below and click on save.



**Step 3.4:** Go to X12 tab and configure the Basic X12 (these are available only for Partner that we are trading with) options along with ISA and GS control options based on values provided in the sample document (840) and click on save.

ABC Stores - Trading Partner ⓘ Folder Add Description

Overview X12 Standard Contact Info Communication Document Types Archiving Where Used

### X12 Standard Configuration ⓘ

Configure identification and other settings related to the X12 document standard this partner uses.

> Basic X12 Options

Functional Acknowledgment Options	Acknowledge Functional Groups
Document Envelope Option	Group By Functional Group
Element Delimiter	Star Delimited
Segment Termination Character	Tilde (~)
Filter Functional Acknowledgments ⓘ	<input type="checkbox"/>
Reject Duplicate ISA ⓘ	<input type="checkbox"/>
Validate Outbound Interchanges ⓘ	<input type="checkbox"/>
Outbound Validation Option ⓘ	Filter Errored Documents

> ISA Identification Options

Authorization Information (ISA01,ISA02)

Qualifier	00-No Authorization Information Present
ID	

Security Information (ISA03,ISA04)

Qualifier	00-No Security Information Present
ID	

Interchange ID (ISA05/07,ISA06/08)

Qualifier	ZZ-Mutually Defined
ID	ABC123

> ISA Version / Control Options

Interchange Standard ID (ISA11)	U
Interchange Version (ISA12)	00401
Interchange Ack. Requested (ISA14)	<input type="checkbox"/>
Test Indicator (ISA15)	T-Test
Component Separator (ISA16)	:

> GS Version / Control Options

Application Code (GS02/03)	ABC123
Responsible Agency Code (GS07)	X-Accredited Standards Committee
GS Version (GS08)	004010

Save Save and Close Close Previous Save on 06 Dec 2023 at 05:28:13 PM UTC+5:30 Revert

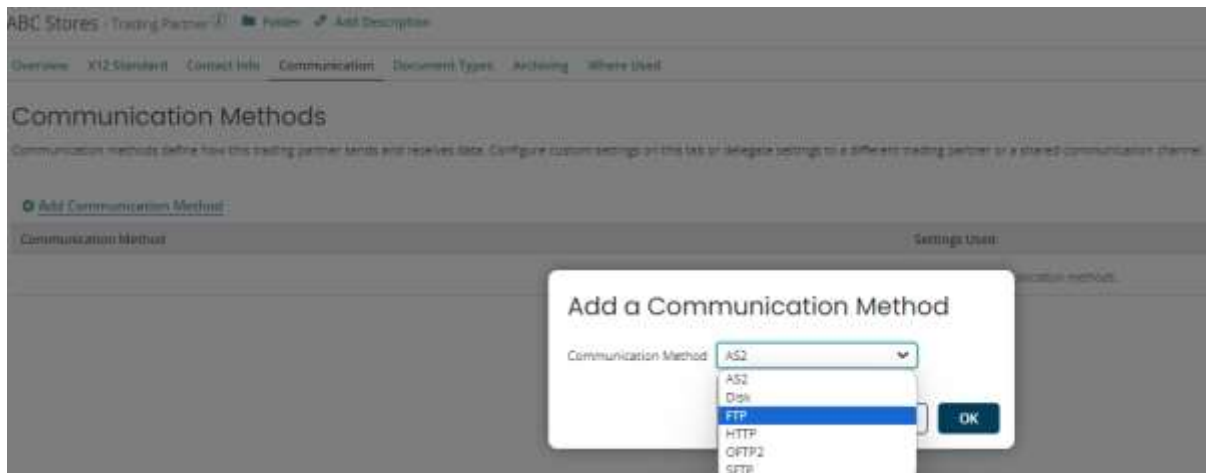
Note: For inbound operation Partner will be the sender. So, we have to configure ISA05, ISA06, GS02 for ISA and GS control options respectively.

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**Step 3.5:** Go to communication tab and click on Add communication method and choose FTP.



**Step 3.6:** Configure the Communication Settings to Use All Defaults and click on close button in the bottom left and click on save the component.

## Edit FTP Configuration

Configure this partner's FTP settings. These settings will be used whenever this partner appears in a start shape or trading partner shape that is set to use FTP. You can also choose to use My Company default settings or a shared communication channel.

Communication Settings



This partner will use the settings configured in whichever My Company it is paired with on a start or trading partner shape.

Now configure Trading Partner Component for Second Partner i.e., XYZ Stores by following the steps from 3.1-3.6

**Note:** Configure BasicX12, ISA, GS control options by referring the document related to Trading Partner XYZ Stores i.e., 850 EDI file.



## Process Group Component

- Processing Group Component used to add, change or remove trading partners in one location without touching the process logic.
- You can create processing groups on the Build tab by clicking **Create New** and selecting **Processing Group** from the list.
- Processing Group Component are the components which can be deployed individually.
- Each Trading Partner in a deployed Processing Group uses a trading partner connection license.
- Because Processing Groups are deployed independently, you must deploy them in order for them to be used in a process.
- To use a Processing Group in a process, open the Start shape that is set to the Trading Partner option or the Trading Partner shape. Then, select **Use a Processing Group component** and chose your Processing Group component.
- Routing is faster and easier with processing groups.

### Processing Group members

The Members tab of the Processing Group component allows you to **Add a Trading Partner** to the list.

### Processing Group routes

- The Routes tab of the Processing Group component allows you to specify how to route the documents and which process to be called.
- We can route the documents based on documents, partners and No Routes Defined.

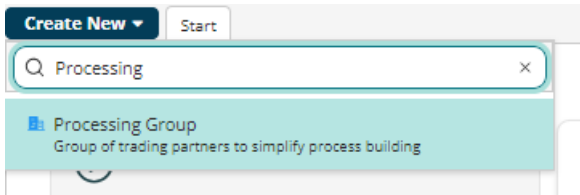
We are performing an inbound operation with One My Company and 2 Trading Partners

Vendor (My Company): Kennymos

Partners: ABC Stores and XYZ Stores

## Configuring Processing Group Component

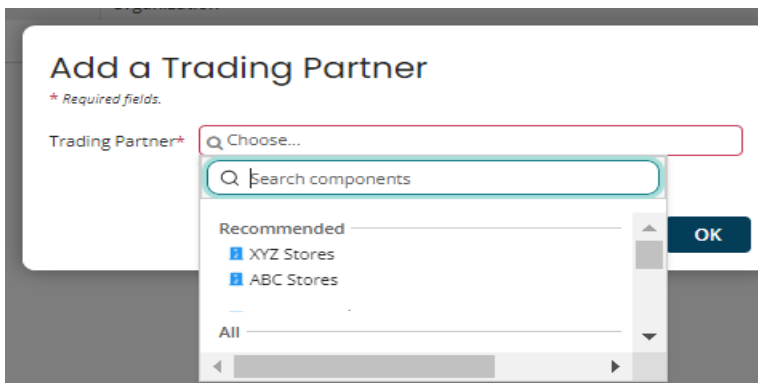
**Step 4.1:** Click on create new and type Processing Group in the search box and choose Processing Group component.



**Step 4.2:** Configure the Component name as shown below.



**Step 4.3:** Under the Members tab, click on Add a Trading Partner and choose the partners (ABC Stores and XYZ Stores) which we configured previously.



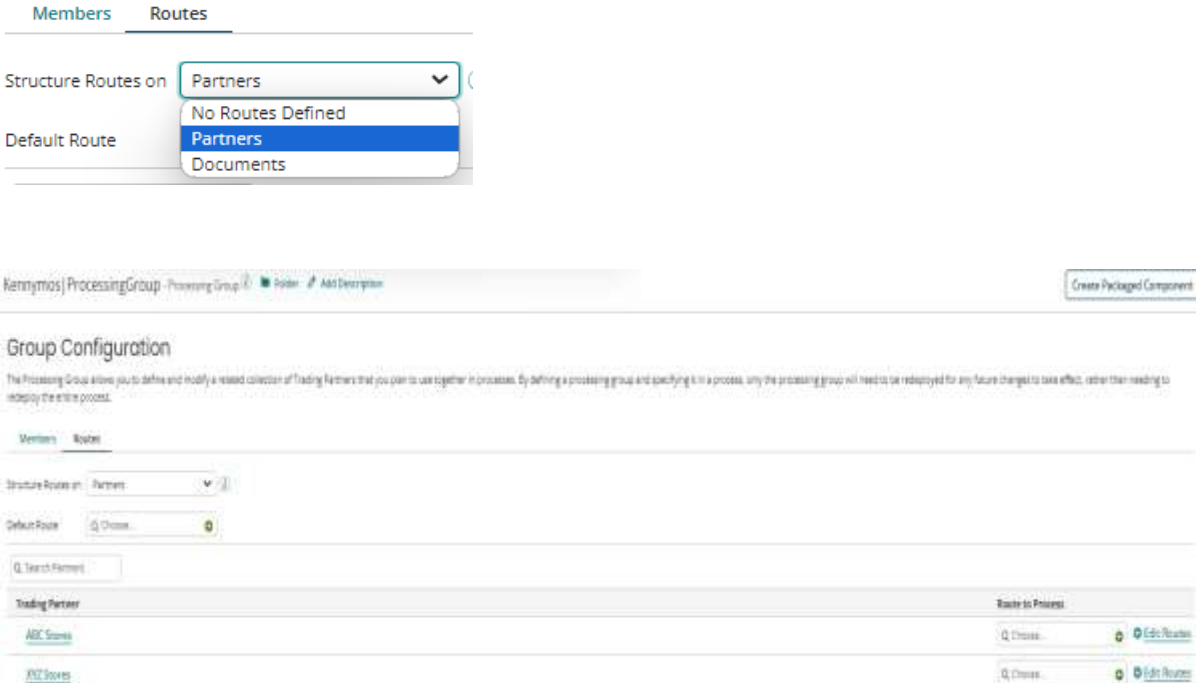
**Step 4.4:** The component will look as shown below



### Step 4.5: Go to Routes tab and choose Partners' option

## Group Configuration

The Processing Group allows you to define and modify a n redeploy the entire process.



Kennymos | ProcessingGroup - Processing Group | Folder | Add Description | Create Packaged Component

Group Configuration

The Processing Group allows you to define and modify a related collection of Trading Partners that you plan to use together in processes. By defining a processing group and specifying it in a process, any the processing group will need to be redeployed for any future changes to take effect, other than needing to redeploy the entire process.

Members Routes

Structure Routes on: Partners

Default Route: Partners

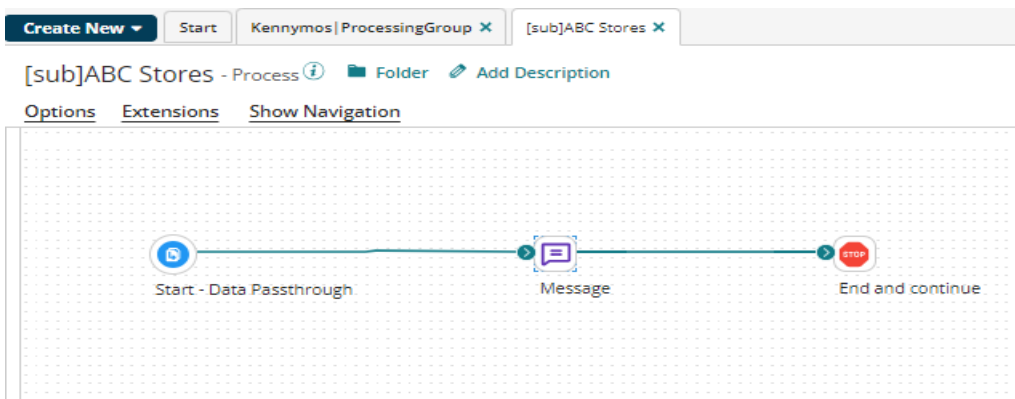
Trading Partner	Route to Process
ABC Stores	Choose...
XYZ Stores	Choose...

### Step 4.6: Now we can route each Partner to separate Processes.

Configure a process for each Partner

Partner	Process
ABC Stores	[sub]ABC Stores
XYZ Stores	[sub]XYZ Stores

### [sub]ABC Stores:



Create New | Start | Kennymos | ProcessingGroup | [sub]ABC Stores

[sub]ABC Stores - Process | Folder | Add Description

Options | Extensions | Show Navigation

```

graph LR
    Start([Start - Data Passthrough]) --> Message[Message]
    Message --> End([End and continue])
  
```

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Configure the message shape for [sub]ABC Stores as shown below.

**Message Shape** ⓘ

To transform incoming document data into a free-form message using a combination of static and dynamic variables, use the Message shape. The Message shape is often used to construct email messages.

Display Name:

Option:  Combine documents into a single message ⓘ

Message: 

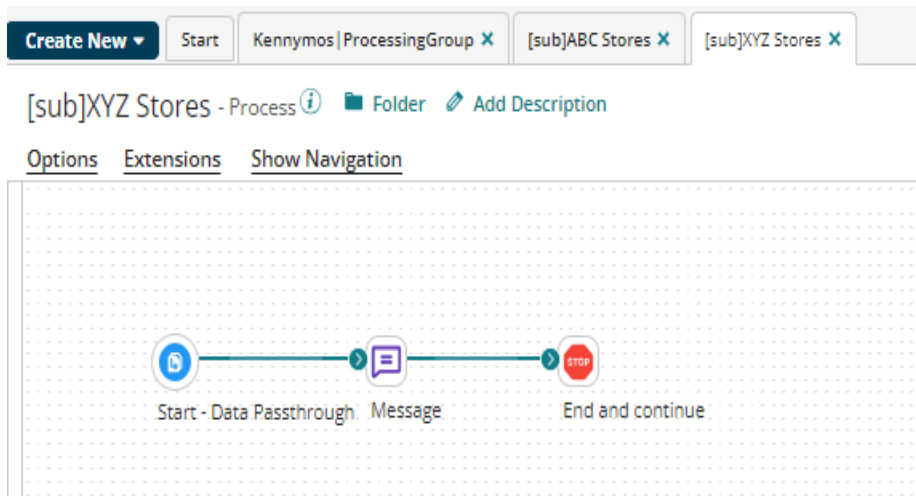
This is a Process for Trading Partner ABC Stores  
(1)

Variables: 

(1) Current Date

OK Cancel

**[sub]XYZ Stores:**



Configure the message shape for **[sub]XYZ Stores** as shown below.

### Message Shape (?)

To transform incoming document data into a free-form message using a combination of static and dynamic variables, use the Message shape. The Message shape is often used to construct email messages.

---

Display Name

Option  Combine documents into a single message (?)

Message

```
This is a Process for Trading Partner XYZ Stores  
-----  
{1}
```

Variables

+ ✎ ✕ ↑ ↓

```
{1} Current Date
```

---

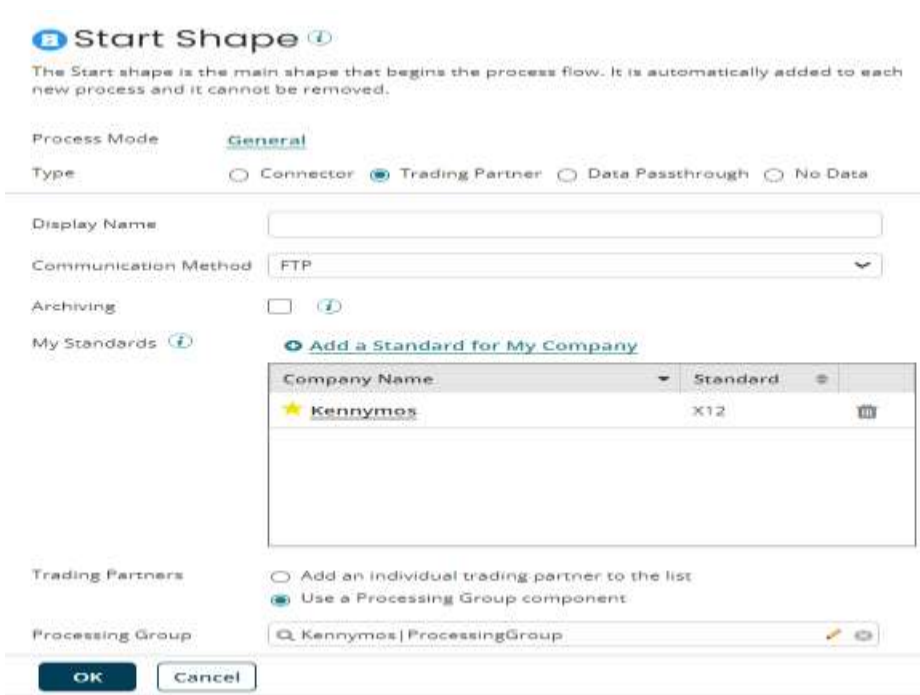
The configuration of Trading Partners, FTP communication method, Processing Group Component is completed. Now it's time to create an inbound Process by using the components which we have configured.

## Steps to Build inbound Process

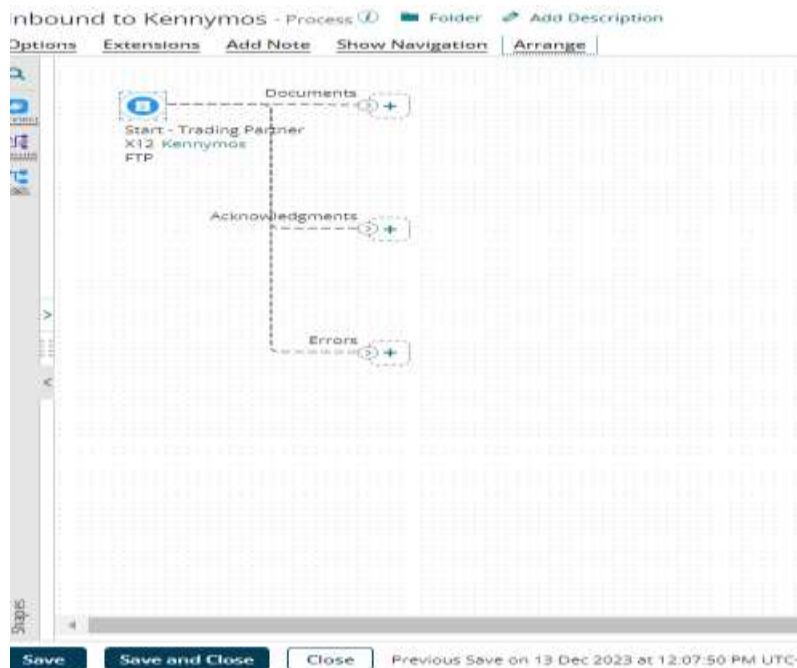
**Step5.1:** Create a new process with the name as Inbound to Kennymos and configure the start shape with Trading Partner.



**Step 5.2:** choose the communication method as FTP and select Kennymos Trading Partner under My Standards and choose Use a Processing group Component option and select **Kennymos|Processing Group** Component which we have configured earlier and click on OK.



**Step 5.3:** The Process looks as shown below.



**Step 5.4:** Drag and drop a Process route shape and add it in the documents path. Choose the Processing Group option and select **Kennymos|Processing Group**

**Process Route Shape** ⓘ

To dynamically select the process or trading partner to send documents, based upon routing rules defined in the specified Process Route or Processing Group component, use the Process Route shape.

The Process Route shape is useful for sending documents to one of several processes, while managing the routing logic separately. It also allows you to modify and deploy the parent Process, Process Route component, and the subprocesses independently.

---

**General**

Display Name:

Route By ⓘ:  Process Route  Processing Group

Processing Group\*:  ⓘ

Options:  Wait for process to complete?  Abort if process fails?

---

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**Step 5.5:** Drag and drop a Trading Partner shape and attach it in the Acknowledgements path. Configure the trading partner shape as shown below.

### Trading Partner Shape ?

The Trading Partner shape is used to configure document standards and communication types for both your company partners that you trade with. Trading Partner functionality supports X12, HL7, EDIFACT, ODETT, ROSETTANET, TRADACOMS, and custom document standards.

---

Display Name

Communication Method FTP ▼

Archiving  ?

My Standards ?

+ Add a Standard for My Company

Company Name	Standard	⊗
✶ Kennymos	X12	⊗

Trading Partners

Add an individual trading partner to the list

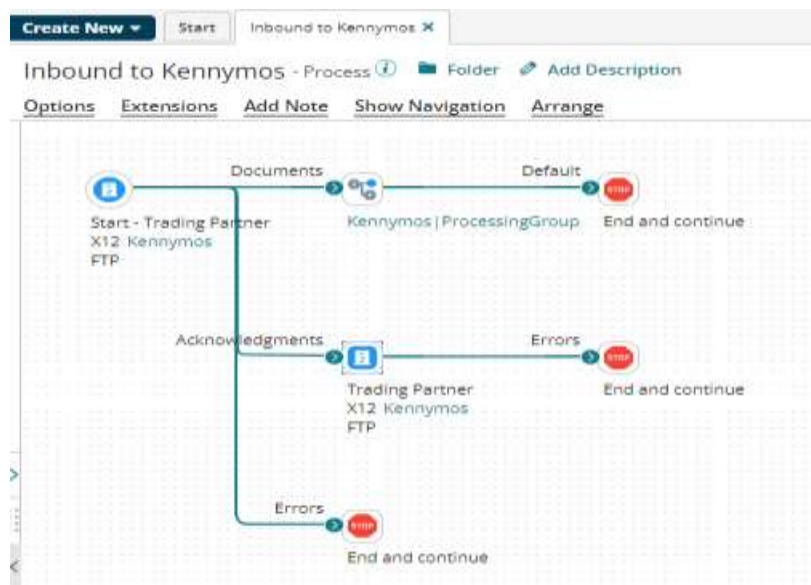
Use a Processing Group component

Processing Group 🔍 Kennymos | ProcessingGroup ✎ ⊗

---

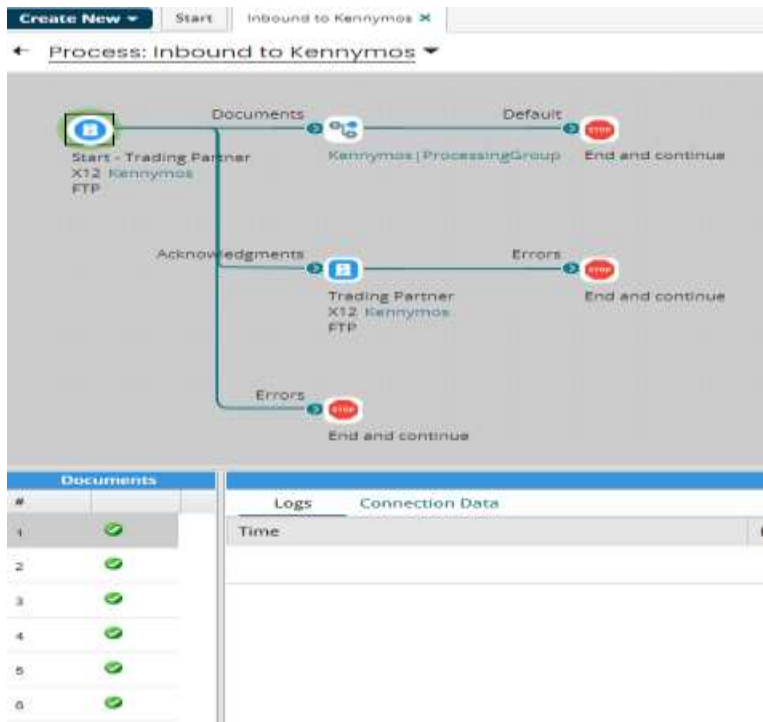
OK
Cancel

**Step 5.6:** Attach stop shape at the end of each path. Click on save to save the changes made to the process. Now, the entire Process looks as shown below.





**Step5.7:** Now click on test button to test the Process.

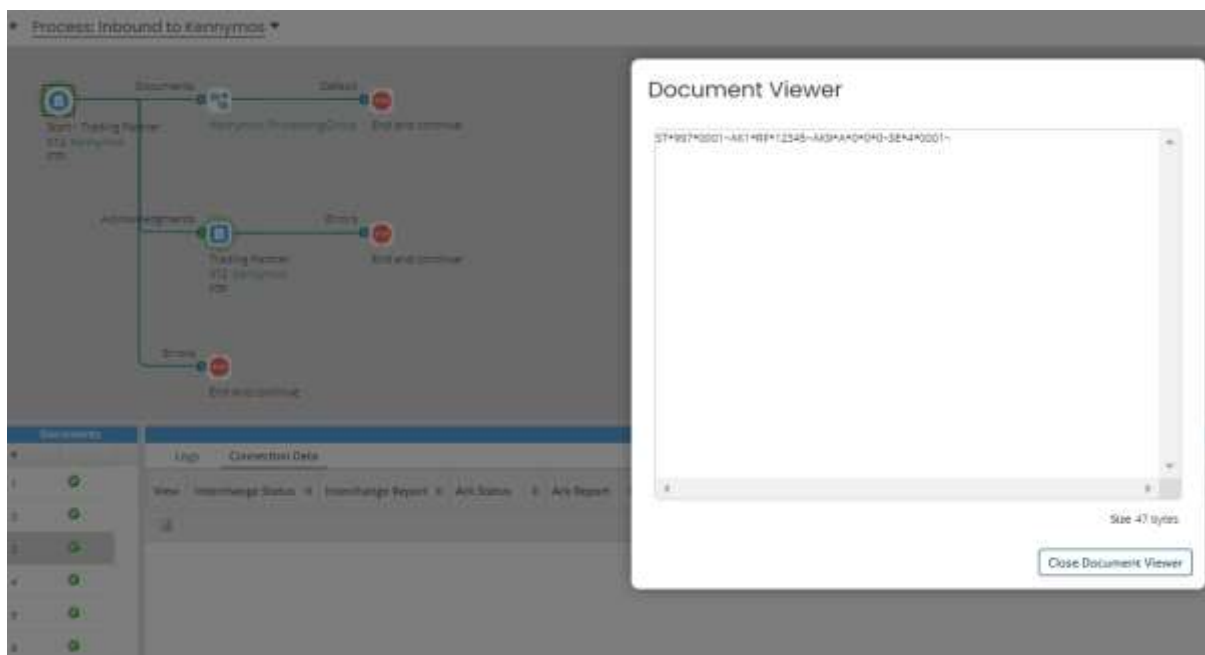


Documents	
#	
1	✓
2	✓
3	✓
4	✓
5	✓
6	✓

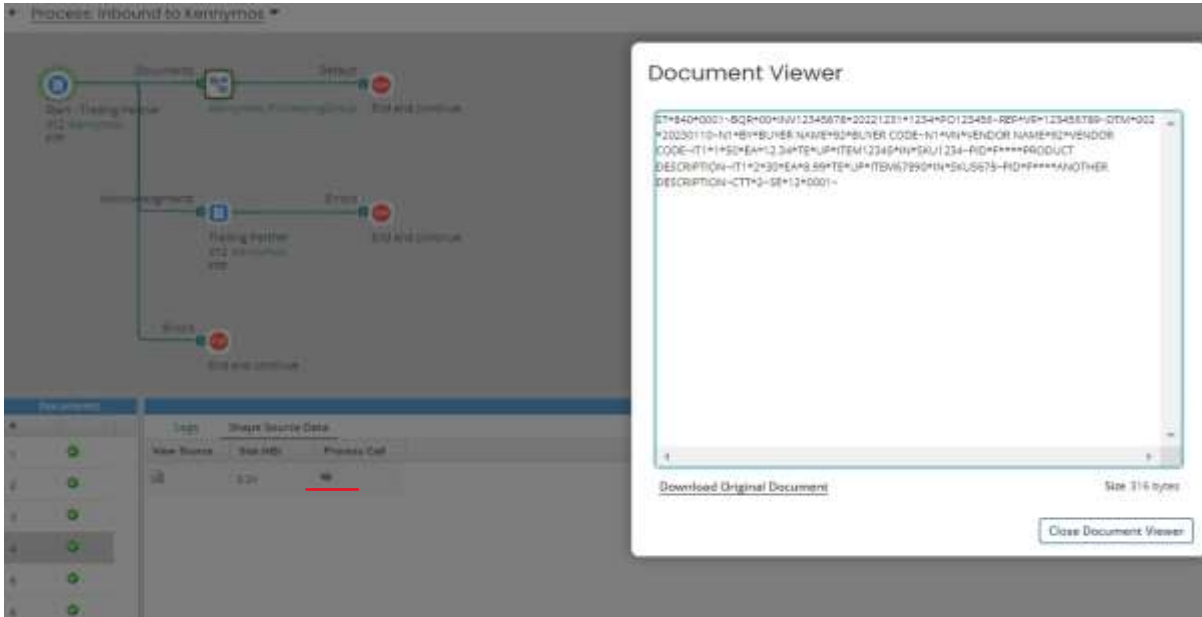
Click on each document to check which path it's following.

**Step5.8:** First and second documents are empty. They act as placeholders for raw data in the process reporting page once the process is deployed.

**Step5.9:** Click on third document. We can see it's going under Acknowledgements path.



**Step5.10:** Click on fourth document. We can see it's following documents path.



The screenshot shows a process flow for 'Process: Inbound to Kennymos'. The flow starts with 'Start - Trading Partner X12 Kennymos FTP', which branches into 'Documents' and 'Acknowledgments'. The 'Documents' path leads to 'Kennymos | ProcessingGroup', which then branches into 'Default' and 'Errors'. The 'Default' path leads to 'End and continue', and the 'Errors' path leads to 'End and continue'. The 'Acknowledgments' path leads to 'Trading Partner X12 Kennymos FTP', which then branches into 'Errors' and 'End and continue'. The 'Errors' path leads to 'End and continue'.

The document viewer shows the following XML data:

```

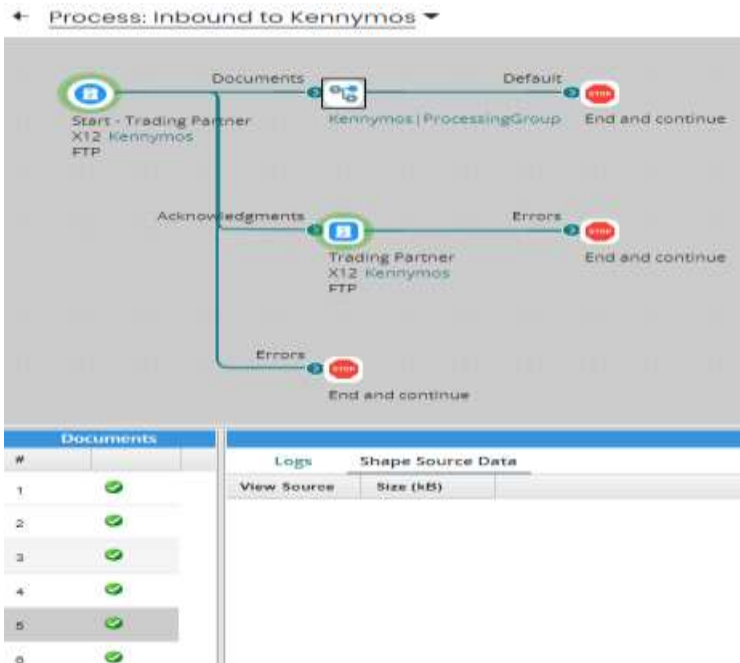
ET*8400001~SQR*00*99/12345678~0001|ZZ*1|ZZ*PD|23456~REF*US*12345678~DTM*002
*20200110~N1*88*BUYER NAME*88*BUYER CODE~N1*VIN*VENDOR NAME*82*VENDOR
CODE~I1*150*EA*1234*ITEM*12345678901234~RD*F***PRODUCT
DESCRIPTION~I1*2*30*EA*88*ITEM*123456789012345678~RD*F***ANOTHER
DESCRIPTION~CTT*3~SE*1|*0001~
  
```

Buttons: Download Original Document, Close Document Viewer, Size 316 bytes

Now click on blue arrow.

We can see the document is routed to process [sub]ABC Stores as this document is of type 840 which is belongs to partner ABC Stores

**Step5.11:** Click on fifth document. We can see it's going under Acknowledgements path.

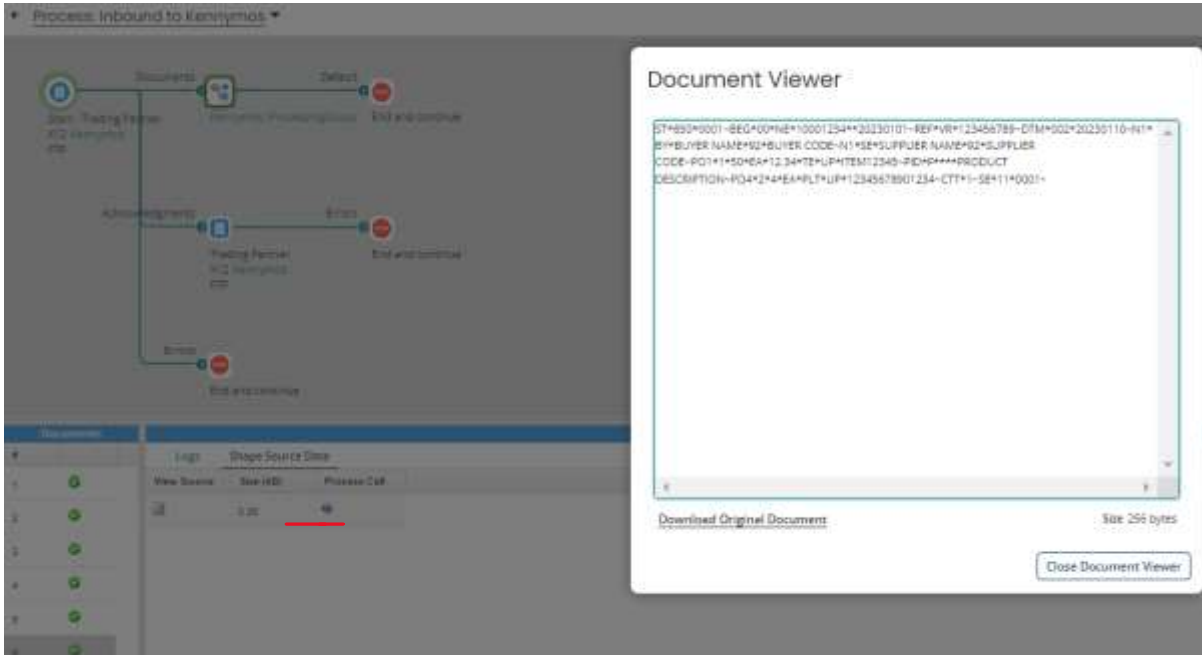


The screenshot shows the same process flow as in Step 5.10. The 'Documents' path leads to 'Kennymos | ProcessingGroup', which then branches into 'Default' and 'Errors'. The 'Default' path leads to 'End and continue', and the 'Errors' path leads to 'End and continue'. The 'Acknowledgments' path leads to 'Trading Partner X12 Kennymos FTP', which then branches into 'Errors' and 'End and continue'. The 'Errors' path leads to 'End and continue'.

The document list shows the following documents:

#	View Source	Size (kB)
1	✓	
2	✓	
3	✓	
4	✓	
5	✓	
6	✓	

**Step5.12:** Click on last document. We can see it's going under documents path.



The screenshot shows a process flow diagram for 'Process: Inbound to Kenyemas'. The flow starts with a 'Documents' component, which branches into 'Select' and 'End and continue'. Below the flow, a 'Documents' table is visible with columns for 'Log', 'Stage', 'Source', and 'Data'. The 'Documents' table shows a list of documents with a 'Process Call' column. A 'Document Viewer' window is open, displaying the following EDI data:

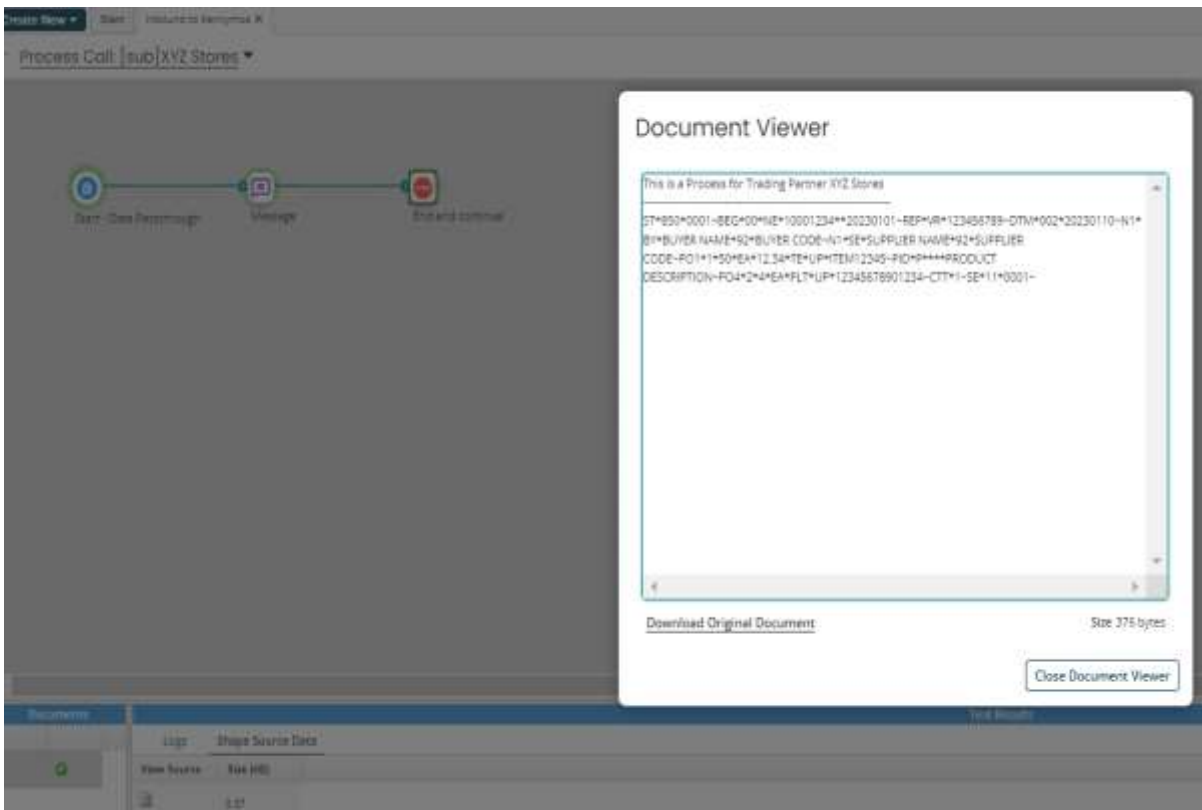
```

ST*850*0001~BEG*00*HE*10001234**20230101~REF*VR*123456789~DTM*002*20230110~N1*
B*BUYER NAME*92*BUYER CODE~N1*SE*SUPPLIER NAME*92*SUPPLIER
CODE~PO1*1*50*EA*12.34*TE*UP*ITEM12345~PID*P****PRODUCT
DESCRIPTION~PO4*2*4*EA*PL*UP*12345678901234~CTT*1~SE*11*0001~
  
```

At the bottom of the document viewer, it says 'Download Original Document' and 'Size: 254 bytes'. A 'Close Document Viewer' button is also present.

Now click on blue arrow.

We can see the document is routed to process [sub]XYZ Stores as this document is of type 850 which is belongs to partner XYZ Stores



The screenshot shows a process flow diagram for 'Process Call: [sub]XYZ Stores'. The flow starts with a 'Documents' component, which branches into 'Data Processing' and 'End and continue'. Below the flow, a 'Documents' table is visible with columns for 'Log', 'Stage', 'Source', and 'Data'. The 'Documents' table shows a list of documents with a 'Process Call' column. A 'Document Viewer' window is open, displaying the following EDI data:

```

This is a Process for Trading Partner XYZ Stores

ST*850*0001~BEG*00*HE*10001234**20230101~REF*VR*123456789~DTM*002*20230110~N1*
B*BUYER NAME*92*BUYER CODE~N1*SE*SUPPLIER NAME*92*SUPPLIER
CODE~PO1*1*50*EA*12.34*TE*UP*ITEM12345~PID*P****PRODUCT
DESCRIPTION~PO4*2*4*EA*PL*UP*12345678901234~CTT*1~SE*11*0001~
  
```

At the bottom of the document viewer, it says 'Download Original Document' and 'Size: 375 bytes'. A 'Close Document Viewer' button is also present.

In this way the Process route component will route the documents to partner specific processes.

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## References

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- <https://filezilla-project.org/download.php?platform=win64&type=server>
- [https://help.boomi.com/docs/atomsphere/integration/process%20building/c-atm-trading\\_partner\\_group\\_components\\_5f1fa272-5d7d-4e5a-a2c3-da273b3db418/](https://help.boomi.com/docs/atomsphere/integration/process%20building/c-atm-trading_partner_group_components_5f1fa272-5d7d-4e5a-a2c3-da273b3db418/)
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