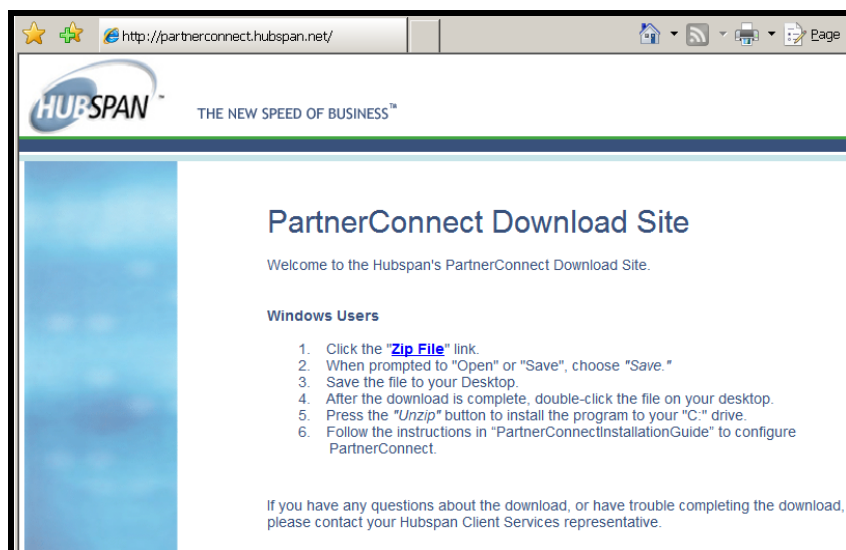


HUBSPAN PARTNERCONNECT DOWNLOAD & INSTALLATION GUIDE (Intel File Transfer System)

PartnerConnect Download Site

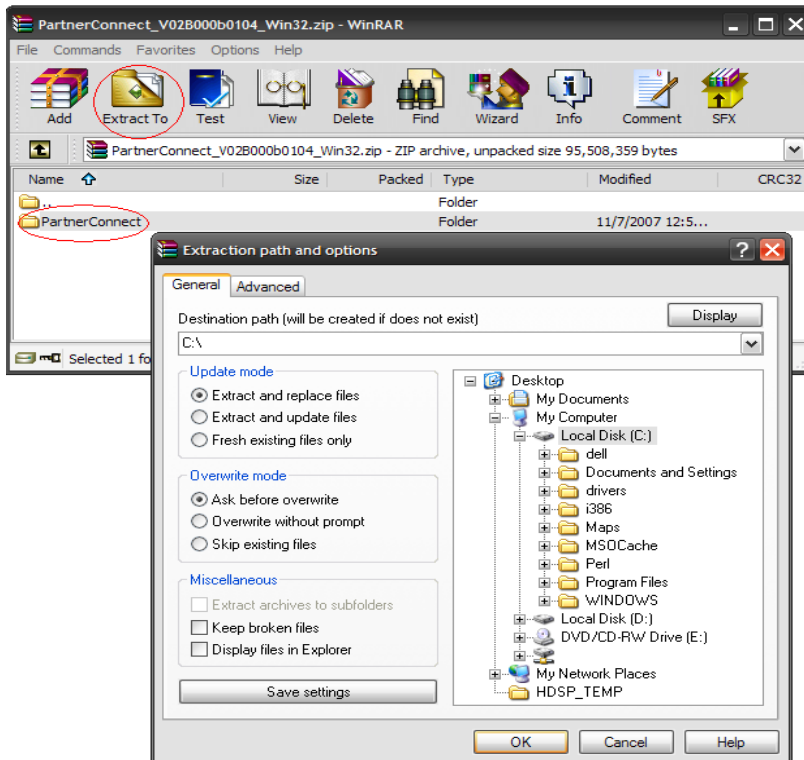
URL: <http://partnerconnect.hubspan.net>
Username: `hs\partnerconnect`
Password: `5ReRuc5e`



- **PartnerConnect_V02B000b0104_Win32.zip**
- File Size: 40MB (zipped)
- Current PartnerConnect version is available for MS Windows platform only;
 - System requirements
 - 256 MB RAM
 - 200 MB free disk space
 - Windows XP or newer

Installing PartnerConnect

1. Open file **PartnerConnect_V02B000b0104_Win32.zip**
2. Either drag and drop PartnerConnect folder to a desire directory OR
Click on “Extract To” button and navigate to destination path and click “OK” button to where you want PartnerConnect directory structure to reside (be installed).



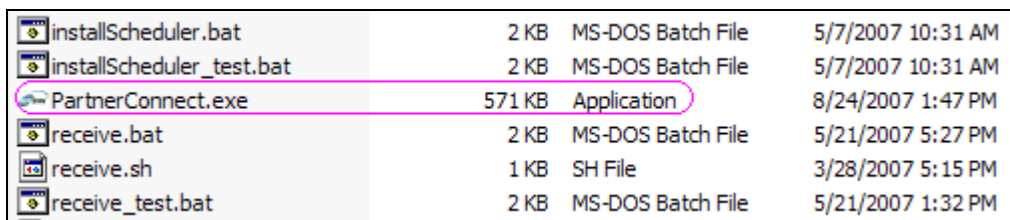
PartnerConnect Graphic User Interface Usage

This section details the usage of the various dialogs in the PartnerConnect Graphic User Interface (GUI) to configure the client, along with sending and receiving files.

Opening the GUI

Once the PartnerConnect client software has been installed, the GUI can be run by following these steps:

1. Open “My Computer”. In Window XP and later, this is in the start menu. For older versions of Windows, a link should be provided on the Desktop.
2. Double-click on the drive where you installed the PartnerConnect software. By default, the folder is called “PartnerConnect”.
3. Double-click on the “bin” directory underneath your PartnerConnect installation.
4. Double-click on the *PartnerConnect.exe* file. This will run the PartnerConnect GUI.

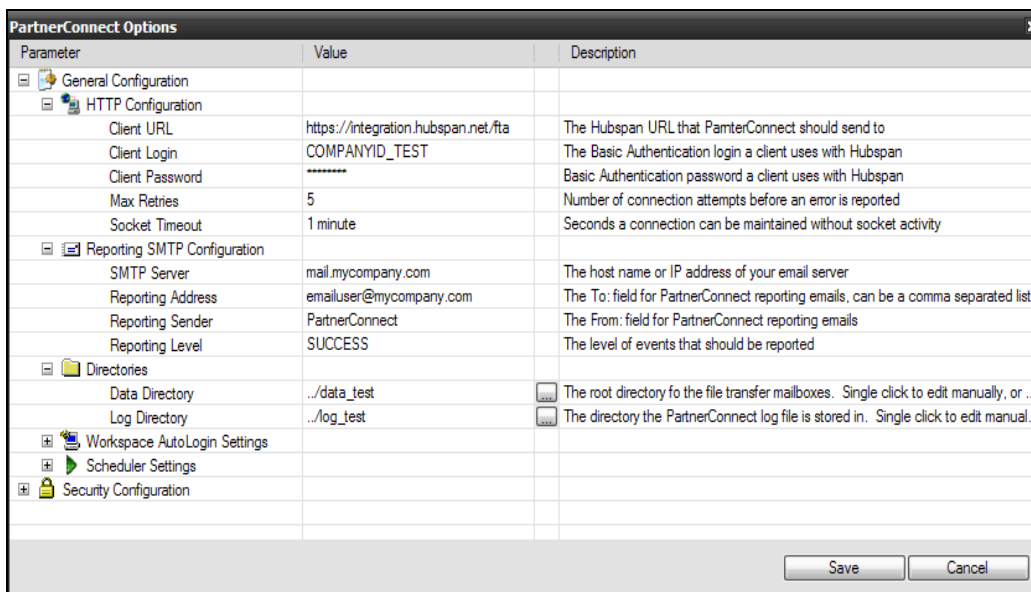


installScheduler.bat	2 KB	MS-DOS Batch File	5/7/2007 10:31 AM
installScheduler_test.bat	2 KB	MS-DOS Batch File	5/7/2007 10:31 AM
PartnerConnect.exe	571 KB	Application	8/24/2007 1:47 PM
receive.bat	2 KB	MS-DOS Batch File	5/21/2007 5:27 PM
receive.sh	1 KB	SH File	3/28/2007 5:15 PM
receive_test.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM

Figure 1 - PartnerConnect Executable

Configuring PartnerConnect

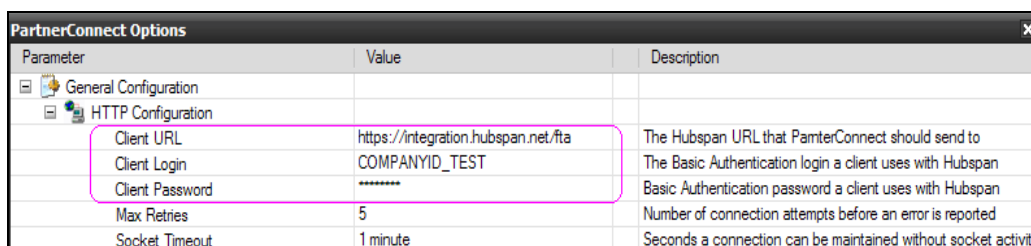
When running the PartnerConnect GUI for the first time, the configuration dialog opens. This dialog is used to configure the PartnerConnect client with values that can be used to trade data with partners on the Hubspan Secure File Transfer System.



Parameter	Value	Description
General Configuration		
HTTP Configuration		
Client URL	https://integration.hubspan.net/fta	The Hubspan URL that PartnerConnect should send to
Client Login	COMPANYID_TEST	The Basic Authentication login a client uses with Hubspan
Client Password	*****	Basic Authentication password a client uses with Hubspan
Max Retries	5	Number of connection attempts before an error is reported
Socket Timeout	1 minute	Seconds a connection can be maintained without socket activity
Reporting SMTP Configuration		
SMTP Server	mail.mycompany.com	The host name or IP address of your email server
Reporting Address	emailuser@mycompany.com	The To: field for PartnerConnect reporting emails, can be a comma separated list
Reporting Sender	PartnerConnect	The From: field for PartnerConnect reporting emails
Reporting Level	SUCCESS	The level of events that should be reported
Directories		
Data Directory	../data_test	The root directory for the file transfer mailboxes. Single click to edit manually, or ...
Log Directory	../log_test	The directory the PartnerConnect log file is stored in. Single click to edit manual...
Workspace AutoLogin Settings		
Scheduler Settings		
Security Configuration		

Figure 2 – PartnerConnect Configuration Dialog

The user may not get past the configuration dialog without a valid configuration that is used to communicate with the Hubspan File Transfer System. The PartnerConnect GUI requires the following information to be entered for these parameters: *client_url*, *client_login*, *client_password*, *smtp_server*, *reporting_level*, *reporting_address*, *data_directory*, and *log_directory* entries in the file to properly run PartnerConnect.



Parameter	Value	Description
General Configuration		
HTTP Configuration		
Client URL	https://integration.hubspan.net/fta	The Hubspan URL that PartnerConnect should send to
Client Login	COMPANYID_TEST	The Basic Authentication login a client uses with Hubspan
Client Password	*****	Basic Authentication password a client uses with Hubspan
Max Retries	5	Number of connection attempts before an error is reported
Socket Timeout	1 minute	Seconds a connection can be maintained without socket activity

Figure 3 - PartnerConnect Login and Password

Hubspan provides three key pieces of credential information during the initial implementation phase: *client_url*, *client_login*, and *client_password*. Descriptions and usage of the configuration options appear in the right column of the configuration dialog. Once you have correctly configured PartnerConnect to interact with the Hubspan Secure File Transfer System, the main PartnerConnect GUI window will open.

After clicking the Save button, PartnerConnect will attempt to connect to Hubspan’s servers to complete the configuration. Failure to connect often means that either there is a networking problem or credential information entered is incorrect.

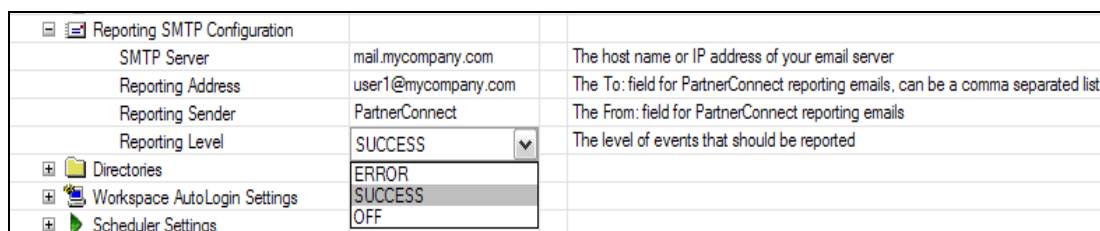
Client SMTP Notifications

The Report SMTP Notification setting enables the PartnerConnect application to send email notification or log output when an action was performed on PartnerConnect. The user must enter valid SMTP information and where the input values cannot be empty or blank.

Reporting Level (SUCCESS) – PartnerConnect application will trigger a notification when a successful event occurred such as when a file was successfully uploaded to Hubspan or downloaded from Hubspan.

Reporting Level (ERROR) – PartnerConnect application will trigger a notification when a transmission error occurred such as connection or data upload/download failure.

Reporting Level (OFF) – User can turn off PartnerConnect from sending even notifications. This is useful for users who do not know their SMTP/mail server name or IP address.



Reporting SMTP Configuration		
SMTP Server	mail.mycompany.com	The host name or IP address of your email server
Reporting Address	user1@mycompany.com	The To: field for PartnerConnect reporting emails, can be a comma separated list
Reporting Sender	PartnerConnect	The From: field for PartnerConnect reporting emails
Reporting Level	SUCCESS	The level of events that should be reported
Directories	ERROR	
Workspace AutoLogin Settings	SUCCESS	
Scheduler Settings	OFF	

Figure 4 - PartnerConnect SMTP Configuration

Directory Structure

Data Directory - Name of the directory where data exchanged with the Hubspan system resides.

- ../data_test** Test environment containing specific sub-directories for send/receiving data
- ../data** Production environment containing specific sub-directories for send/receiving data

Log Directory - Name of the directory where audit log files are to be written. File PCFTC.log can be found.

Directories		
Data Directory	../data_test	The root directory fo the file transfer mailboxes. Single click to edit manually, or ...
Log Directory	../log_test	The directory the PartnerConnect log file is stored in. Single click to edit manual...

Figure 5 - PartnerConnect Directory Structure

Installing PartnerConnect as a Service

PartnerConnect can be installed as a Windows Service to perform the Send, Receive, and Configure operations automatically.

Scheduler Settings		
Send Interval	15	Send job time interval (minutes)
Receive Interval	15	Receive quartz job time interval (minutes)
Configure Interval	720	Configure quartz job time interval (minutes)

Figure 6 - PartnerConnect Automated Scheduling Service

Note: A Windows Service is a Process that runs in the background, while the machine it's installed on is running.

The PartnerConnect Windows Service is a scheduler that runs the core PartnerConnect tasks: Send, Receive, and Configure. These tasks run at configurable intervals, with the Send/Receive running every 15 minutes and Configure running every 12 hours, by default.

The intervals that these tasks are run by the Scheduler are configurable as an option. The user can also edit the *PCFTC.ini* file to configure these parameters.

```
time.interval.send = 15    - The interval (in minutes) that the Send task should be run
time.interval.receive = 20 - The interval (in minutes) that the Receive task should be run
time.interval.configure = 30 - The interval (in minutes) that the Configure task should be run
```

The following instructions can be used to install PartnerConnect as a Windows Service.

Note: If the Send/Receive/Configure tasks are to execute at a custom interval, the *PCFTC.ini* and *PCFTC_test.ini* file needs to be edited and saved prior to Installing PartnerConnect as a service.

Name	Size	Type	Date Modified
changePassword.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
changePassword_test.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
commonInstallSetup.bat	2 KB	MS-DOS Batch File	5/21/2007 9:15 PM
configure.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
configure_test.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
gui.bat	1 KB	MS-DOS Batch File	5/21/2007 1:32 PM
installScheduler.bat	2 KB	MS-DOS Batch File	5/7/2007 10:31 AM
installScheduler_test.bat	2 KB	MS-DOS Batch File	5/7/2007 10:31 AM
PartnerConnect.exe	571 KB	Application	11/7/2007 12:58 PM
receive.bat	2 KB	MS-DOS Batch File	5/21/2007 5:27 PM
receive_test.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
revealConfigFile.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
revealConfigFile_test.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
secureConfigFile.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
secureConfigFile_test.bat	1 KB	MS-DOS Batch File	5/21/2007 1:32 PM
send.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
send_test.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
setpath.bat	2 KB	MS-DOS Batch File	5/22/2007 3:30 PM
shutdownScheduler.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
shutdownScheduler_test.bat	2 KB	MS-DOS Batch File	5/21/2007 1:32 PM
startupScheduler.bat	1 KB	MS-DOS Batch File	1/10/2007 2:59 PM
uninstallScheduler.bat	1 KB	MS-DOS Batch File	1/29/2007 12:02 PM

596 KB Local intranet

Figure 7 - PartnerConnect BIN directory (executable)

1. **Install PartnerConnect Windows Service** – The InstallScheduler command in the “bin” directory of PartnerConnect should be used to install PartnerConnect as a Windows Service.

installScheduler.bat

2. **Shutdown PartnerConnect as a Service** – Once PartnerConnect is installed as a Windows Service, it continues to run as long as the Computer it is installed on remains powered on. As long as the Service is running, it will continue to execute the Send, Receive, and Configure tasks.

The PartnerConnect Windows Service can be stopped from performing these tasks automatically. There are two ways to do this.

1. Open the “Services” window from the “Administrative Tools”, find the PartnerConnect service, and click the Stop icon.
2. Run the ShutdownScheduler script

shutdownScheduler.bat

3. **Startup PartnerConnect** – If the PartnerConnect Windows Service has been shutdown, either from the “Services” window, or by running shutdownScheduler.bat, it may be started so automatic execution of the Send, Receive, and Configure tasks are resumed.

The PartnerConnect Windows Service can be started, if it had been previously shutdown. There are two ways to do this.

1. Open the “Services” window from the “Administrative Tools”, find the PartnerConnect service, and click the Start icon.
2. Run the StartupScheduler script.

startupScheduler.bat

4. **Uninstall PartnerConnect Windows Service** – If PartnerConnect has been installed as a Windows Service, it may be uninstalled. To perform uninstallation, run the uninstallScheduler.bat command.

uninstallScheduler.bat

Send Files Tab

The main window of the PartnerConnect GUI opens to the “Send Files” tab, which is used to send data files to a trading partner on the Hubspan Secure File Transfer System.

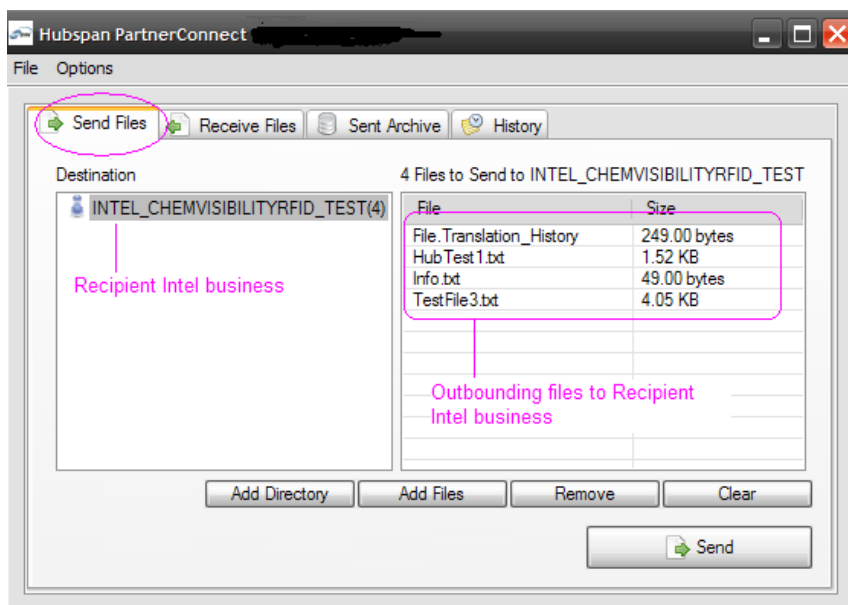




Figure 8 – Send Files Tab

Usage

The usage of the send tab can be described into three distinct steps.

1. **Select a Destination** – A destination is essentially a mailbox in which to deposit files in the Hubspan File Transfer System. A destination can be both a singular recipient (denoted by the  icon), or a Distribution List (denoted by the  icon).
2. **Add Files to Send** – Files can be added to the list of files to send via both the Add Files button, and the Add Directory method. The Add Directory button recursively adds all of the files in an *existing* directory structure to the list of files to send.
3. **Click Send** – The Send button triggers the actual send of data to the Hubspan File Transfer System. Upon clicking this button, the user will be prompted for confirmation to send the files to the selected Destination. Upon confirmation, a dialog will be opened that displays the progress, along with any ancillary information about the progress of the file sends.

Features

The Send Files tab of the PartnerConnect GUI has a number of features to aid in its use.

1. **Mass Distribution Sends** – Instead of manually copying a file, and sending to a number of trading partners individually, the user can save processing time and network resources by sending via the Mass Distribution functionality. This allows for a single transmission of a file to the Hubspan File Transfer System, which in turn distributes the files to each of the trading partners in the Distribution List. Distribution List creation and management is described later in this document.
2. **Add Directory Functionality** – The Add Directory button allows the PartnerConnect GUI user to add a large number of files to send to a trading partner. As mentioned, the Add Directory button recursively traverses a directory and adds all of the files in it to the list of files to send.
3. **Distribution List Description Tooltip** – It is easy to view which trading partners are contained in a Distribution List. To do so, simply move the mouse over the Distribution List on the Send Tab and a tooltip containing the name of the Distribution List and the recipients it contains will be displayed.

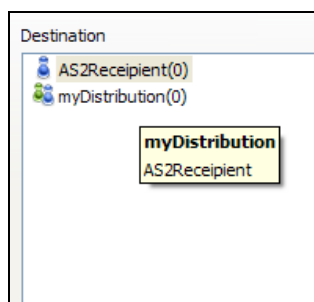


Figure9 - Distribution List Tooltip

Managing Distribution Lists

The creation and maintenance of Distribution Lists can only be done when the Send Tab is the active tab in the PartnerConnect GUI. Assuming the Send Tab is the active tab, the user can access the dialog to manage the PartnerConnect Distribution Lists by selecting the “Manage Distribution Lists” option from the file menu.

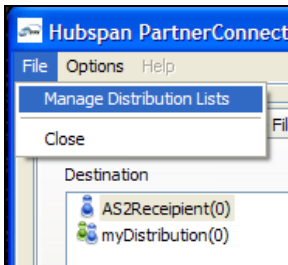


Figure 10 - Accessing the Manage Distribution Lists Dialog

The Manage Distribution Lists dialog allows the user to create and update Distribution Lists. Additional functionality includes the ability to copy the contents of one Distribution List into a new Distribution List, and the ability to validate a Distribution List (verifies that all of the recipients in a Distribution List must have compatible encryption settings).

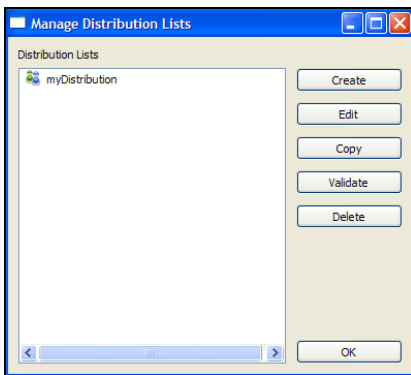


Figure 11 - Manage Distribution Lists Dialog

Upon clicking the create, edit, or copy button from the Manage Distribution Lists dialog, a dialog like the one below will pop up, which allows the user to manipulate the recipients that are included in a Distribution List. The list of trading partners available for inclusion in a Distribution List is the list of trading partners a given PartnerConnect user is configured to exchanges files with in the Hubspan File Transfer System.



Figure 12 - Distribution List Maintenance Dialog

Receive Files Tab

The Receive Files tab allows the PartnerConnect user to retrieve files from the Hubspan File Transfer System.

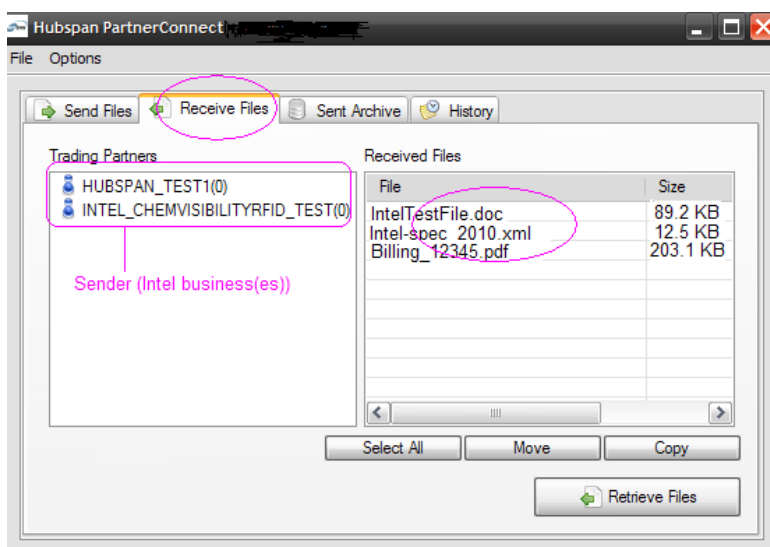


Figure 13 - Receive Files Tab

Usage

To retrieve files from trading partners via the Hubspan File Transfer System, follow these three steps.

1. **Press “Retrieve Files”** – The Retrieve Files button queries the Hubspan File Transfer System for files received from trading partners. In the event new files are downloaded from a trading partner, the name in the trading partner list will change to bold (indicating files were received).
2. **Choose a Trading Partner** – If files have been received from a trading partner, to actually view what was retrieved, the user must select the trading partner from the list on the left side of the dialog. This will essentially allow a view of the contents of the user’s mailbox from the given trading partner.
3. **Move or Copy the Retrieved Files** – The files retrieved from a trading partner, in order to view or edit them, must be moved or copied out of the PartnerConnect application.

Sent Archive Tab

The default functionality of the PartnerConnect Client is to save and archive every file sent via the send command. Once a file has been sent and archived, it must be cleared from the archive to allow the user to send a file of the same name to the same trading partner. These activities can be accomplished from the PartnerConnect GUI Send Archive tab.

Usage

The usage of the Sent Archive tab is comprised by two steps.

1. **Select a Trading Partner** – Selecting a trading partner from the list of trading partners displays a list of the files sent to the given trading partner that have not been cleared from the archive, as below.

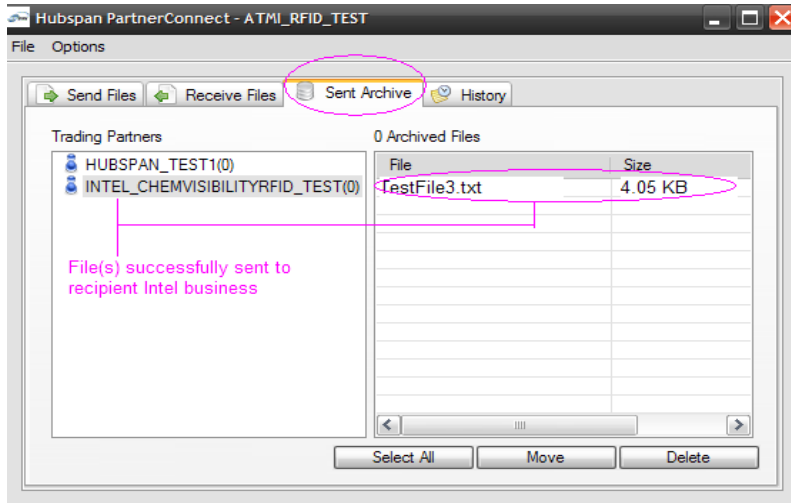


Figure 14 - Sent Archive Tab Contents

2. **Select All** – Selects all files in the sent archive for the selected trading partner. This allows you to move or delete all of the files at once.
3. **Move or Delete Files From Archive** – Once viewing the contents of a trading partner-specific archive, the user should select a list of files to either move or delete and either move or delete them from the Sent Archive.

History Tab

The PartnerConnect GUI History tab allows the user to view the transactional history of files sent and received from a specific PartnerConnect Client installation.

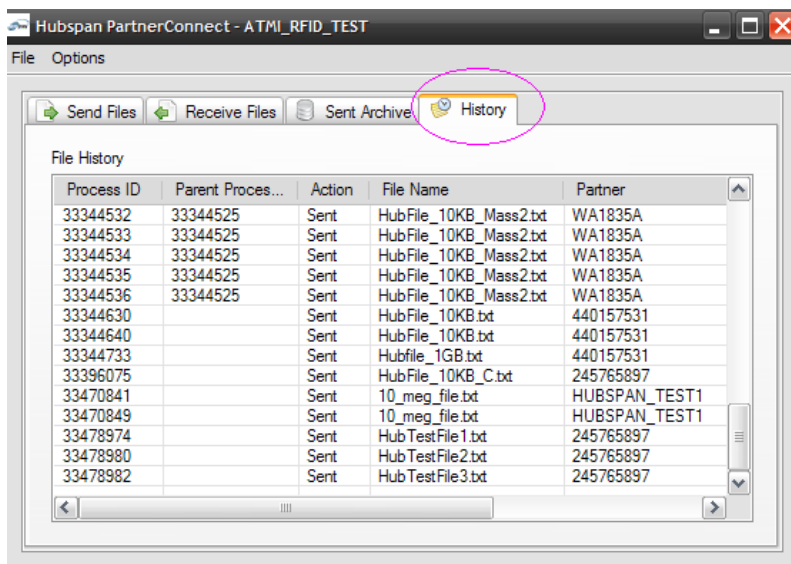


Figure 15 - History Tab

Usage

Each PartnerConnect Client installation keeps a rolling history of transactions for the past 30 days. Also, to view more specific details of a transaction, a PartnerConnect user can double-click on a transaction record on the PartnerConnect History tab, and be automatically logged into the Hubspan Workspace Tool. Along with being logged-in automatically, the user will be taken directly to the transactional details for the given file activity.

Please note that the Auto Login feature requires a valid Workspace login, and a valid configuration for the Workspace AutoLogin Settings in the PartnerConnect configuration dialog.

Options Menu

The PartnerConnect GUI options menu allows the user to configure various settings in the PartnerConnect GUI, and in the client installation in general.

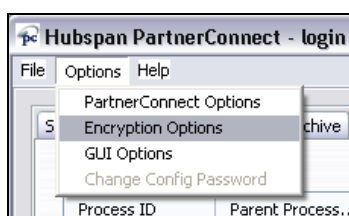


Figure 16 - Options Menu

The Options menu allows the user to pull up the PartnerConnect Options, which are the basic configuration options needed to load the PartnerConnect client to begin with (see [Section 3.2](#) above). Also available are Encryption Options, which allow the user to set up payload-level encryption on a per-trading partner basis, and GUI Options, which include various GUI-specific options.

Encryption Options Dialog

The Encryption Options Dialog allows the user to setup payload-level encryption for each trading partner. Both the PKCS#7 and the PGP encryption routines are available. In order to change the actual values for fields in this dialog, the user must select a trading partner, and then select the type of encryption to send with, and the type of decryption expected with receiving files. Once the cryptography type is selected, the fields associated with that type of cryptography will be editable.

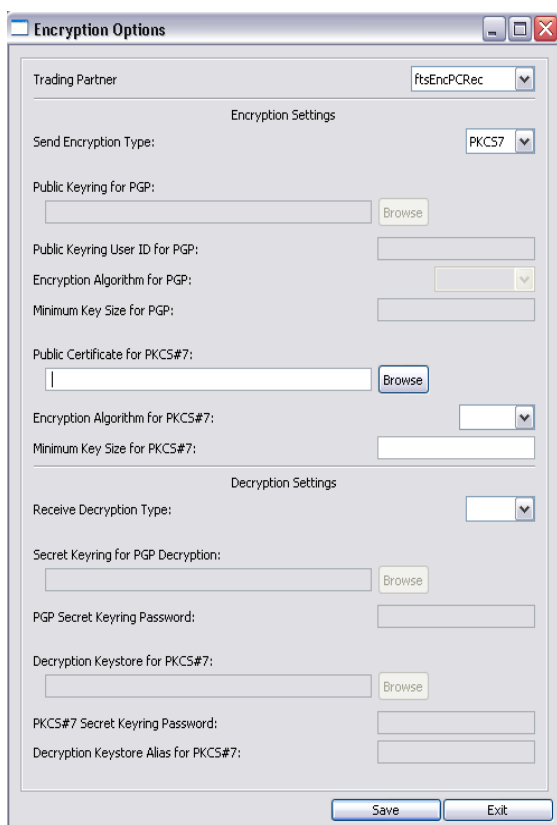


Figure 17 – Encryption Option

GUI Options

The GUI Options dialog allows the user to setup a small set of GUI-specific options, including system tray icons, and whether or not to encrypt its configuration.



Figure 18 – GUI Option

Usage

If the user chooses the “Show Tray Icon” option, a system tray icon is created, which allows the user to close the PartnerConnect GUI from the tray. Also, if the “Minimize to Tray” option is checked in conjunction with the tray icon, the PartnerConnect GUI will minimize to the system tray. If the “Show Tray Icon” is not checked, the “Minimize to Tray” option will grey out, as it is not valid.

The Encrypt configuration file option allows the user to set a password for the configuration file of the PartnerConnect software. Once a password is set for encrypting the PartnerConnect configuration, the “Change Config Password” on the Options menu will be activated.

Change Config Password

The Change Config Password dialog allows the user to change the password used to encrypt the PartnerConnect configuration file. This option is only available when the “Encrypt configuration file” option is chosen in the GUI Options.



Figure 19 – Change Account Password

Getting Help

When your PartnerConnect solution does not function as designed, Hubspan provides resources to assist you with diagnosing and resolving the problems you encounter. If your business encounters errors transmitting one or more production PartnerConnect files, you can open a case with Hubspan Customer Support through several methods:

- **Phone:** **1-206-838-5430 (US PST)** to report an incident with a Customer Support representative
- **E-mail:** support@hubspan.com - Provide details of the errors you are encountering.

Note: You should only open cases with Customer Support regarding issues with the production system. Any implementation issues regarding test files should be communicated to Hubspan Client Services.

When opening a case with Customer Service, be sure to provide as much specific detail as possible about the error that is occurring such as:

1. **Trading Partner Identity** –The organization IDs of the trading entities that you are transmitting files to/from, including any relevant Hubspan Account Codes used to identify business units within the trading partner that you are sending the files to.
2. **Filename** –The name of the files containing the transaction batches that you are having trouble transmitting
3. **Date/Time Transmitted** – The Date and Time (including time zone) that you transmitted the files you are inquiring about.
4. **Error Condition/Log** – A detailed description of what actions the PartnerConnect system performed when the file in question was transmitted such any error messages recorded in the PartnerConnect error log. If possible, you should also include information available in the Hubspan Workspace application regarding the delivery status of the files.

In preparation for opening a technical support case with Hubspan you can carry out several troubleshooting steps to isolate where the problem is occurring:

1. **PartnerConnect Client Software Status** – Check the status of the PartnerConnect Client software after it has completed execution. Review any technical error messages it returns, or whether it has stopped responding. If an automated scheduler is being used to execute PartnerConnect, this information may be logged by the scheduler application.
2. **Files transmit status** – Check the status of each file that is being sent. Note which files remain in the PartnerConnect “tohub” directory and which have been moved to the “tohubarchive” directory.
3. **Client Log** – Review the PartnerConnect log file for details regarding the processing of each transaction batch file. If possible, you may want to try transmitting the failed transaction(s) on your test PartnerConnect system.
4. **Workspace** – Login to the Workspace web application and check the status and content of the files you are investigating.

Maintenance

Over time, Hubspan may offer new versions of the PartnerConnect client software and the PartnerConnect service to provide additional functionality, support new types of files, and to address issues identified in previous versions.

Installing PartnerConnect Upgrades

When new versions of the PartnerConnect software become available from Hubspan, your implementation team should install the upgrade on a test PartnerConnect system. This will permit your team to test and identify the impact the new software will have on your existing business systems before you start to use the upgrade to send production files. When installing PartnerConnect Upgrades, be sure to first backup data such as configuration files, client log, and data directories. Follow closely the installation instructions that accompany the updated

Revision Number	Author	Date	Comments
1.0	Hubspan	01/07/2010	Initial Version
1.1	Hubspan	01/22/2010	Added system req.