ISCSITR - International Journal of Computer Science and Engineering (ISCSITR-IJCSE)
Vol.3, Iss. 1, January - December, 2022, pp. 30-41.
https://iscsitr.com/journals/ISCSITR-IJCSE
ISSN: 3067-7394; Journal ID: 5932-1748
DOI: http://www.doi.org/10.63397/ISCSITR-IJCSE_03_01_005

Engineering Trustworthy Mappings: Creating and Testing EDI and Non-EDI Transformations in IBM Sterling B2B Integrator

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Abstract

The increasing complexity of business-to-business (B2B) data exchanges has amplified the demand for robust transformation and validation mechanisms. IBM Sterling B2B Integrator (SB2Bi) and its Map Editor provide enterprises with comprehensive tooling to define, test, and deploy transformation maps across Electronic Data Interchange (EDI) and non-EDI formats. While the Map Editor supports a variety of standards—including X12, EDIFACT, XML, and variable-length delimited files—practitioners often face challenges when translating partner-specific implementation guidelines into reliable transformation logic. This paper investigates the use of the SI Map Editor for complex data transformations, focusing specifically on the design and testing of EDI and non-EDI maps. By reviewing scholarship and technical documentation published between 2018 and 2022, the study identifies prevailing challenges such as loop scoping, delimiter configuration, and testing fidelity, and proposes a structured methodology for addressing them. Furthermore, the research highlights two critical verification mechanisms—remote Map Test and local Standards Processing Engine (SPE)—that underpin rigorous quality assurance. Findings suggest that integrating formal testing practices with a governance-oriented deployment model reduces runtime errors, enhances maintainability, and improves partner trust. The study contributes to both academic literature on data transformation and practical B2B integration strategies, offering a repeatable framework for enterprises navigating complex multi-format data ecosystems.

Keywords:

IBM Sterling B2B Integrator, Map Editor, Electronic Data Interchange (EDI), Data Transformation, Standards Processing Engine (SPE), Business Process Integration.

How to cite this paper: Raghavendar Akuthota. (2022). Engineering Trustworthy Mappings: Creating and Testing EDI and Non-EDI Transformations in IBM Sterling B2B Integrator. *ISCSITR - International Journal of Computer Science and Engineering (ISCSITR-IJCSE),* 3(1), 30–41.
DOI: http://www.doi.org/10.63397/ISCSITR-IJCSE_03_01_005

URL: https://iscsitr.com/index.php/ISCSITR-IJCSE/article/view/ISCSITR-IJCSE_03_01_005/ISCSITR-IJCSE_03_01_005
Published: 11th August 2022

1. Introductıon

The rapid globalization of supply chains and the digitization of business transactions have elevated the importance of data exchange platforms that can process heterogeneous formats with precision and reliability. Organizations today must exchange structured business documents—such as purchase orders, invoices, and shipping notices—using both standardized Electronic Data Interchange (EDI) formats and non-EDI formats like XML, flat files, and CSV. However, this diversity in data representations introduces complexity into integration workflows, as each trading partner may apply unique implementation conventions, delimiter schemes, or message structures [1]. Within this environment, the IBM Sterling B2B Integrator (SB2Bi) has emerged as a widely adopted solution, particularly due to its Map Editor, which enables the creation, processing, and validation of data maps that ensure seamless communication between disparate systems.

The Map Editor in SB2Bi allows developers to define transformation rules, links, and business logic across different standards. These maps are compiled into artifacts—translation objects (.txo) for general-purpose transformations and XML encoder objects (.ltx) for non-EDI-to-XML conversions—which are executed as part of larger business processes [2]. Such capability positions the Map Editor as a central component of enterprise integration, bridging both legacy and modern systems. Nevertheless, the process of creating and testing maps is not trivial. Mapping errors, insufficient loop control, and incomplete test coverage often result in runtime failures that can delay business operations and compromise partner trust. These challenges highlight the need for systematic approaches to both map development and testing.

Recent literature and technical reports (2018–2022) underline two key dimensions in this domain. First, map design requires a balance between standard rules—covering basic string manipulation, arithmetic, and date-time functions—and extended rules that support more complex logic, iteration control, and conditional mappings [3]. Misuse of extended rules, or inadequate scoping of loops, can create brittle implementations that fail under edge conditions. Second, testing remains a persistent gap in practice. While SB2Bi provides mechanisms such as the remote Map Test (executed against a running server) and local Standards Processing Engine (SPE) tests (executed offline within the design environment), enterprises often lack structured methodologies to integrate these tests into continuous integration and deployment pipelines [6].

From a broader perspective, the importance of reliable transformation maps extends beyond technical correctness. Erroneous mappings can propagate downstream, affecting order fulfillment, compliance with regulatory reporting, and financial reconciliation [9]. For example, incorrect mapping of currency fields or shipment identifiers in EDI 850 (Purchase Order) and 856 (Advance Ship Notice) transactions can lead to costly delays and penalties. Similarly, in non-EDI contexts, failures in CSV-to-XML mappings may disrupt analytics pipelines or integration with enterprise resource planning (ERP) systems. As such, ensuring the integrity of transformation maps is both a technical and a business imperative.

This research paper seeks to address these concerns by conducting a systematic secondary analysis of available academic and industry literature from 2018 to 2022. The aim is to distill best practices for creating and testing EDI and non-EDI transformation maps in IBM Sterling Map Editor. Specifically, the paper pursues three objectives: (1) to characterize the technical capabilities of the Map Editor in handling diverse formats, (2) to identify challenges and solutions in authoring transformation rules and managing complex loops, and (3) to evaluate the strengths and limitations of current testing mechanisms. Through this investigation, the study contributes both to the scholarly discourse on enterprise integration and to the operational toolkit of practitioners responsible for mission-critical B2B data flows.

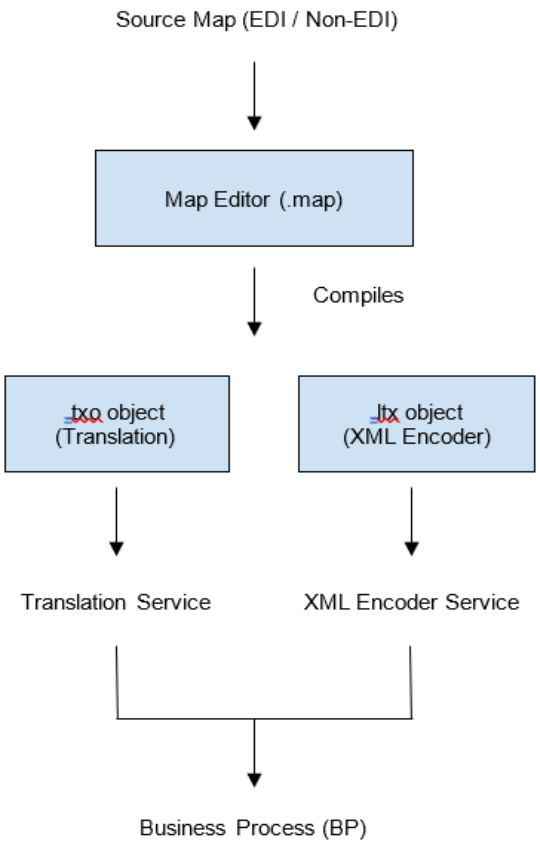

Figure 1: *Artifact Flow*

The remainder of this paper is structured as follows. Section 2 presents a literature review of research and technical documentation published between 2018 and 2022, situating the discussion in broader data integration scholarship. Section 3 articulates the problem statement, breaking down challenges in four categories. Section 4 proposes a solution framework organized around map design, test execution, runtime governance, and deployment practices. Section 5 offers recommendations for organizations seeking to strengthen their use of the Map Editor. Finally, Section 6 concludes by synthesizing the findings and outlining directions for future research.

2. Literature Review

Research published between 2018 and 2022 highlights how enterprises handle structured and semi-structured data using IBM Sterling B2B Integrator (SB2Bi). Much of the academic

and technical documentation during this period concentrates on the Map Editor's ability to create translation objects, enforce trading partner requirements, and sustain interoperability across heterogeneous environments.

One of the recurring themes is the classification of artifacts produced by the editor. The distinction between translation objects (.txo) and XML encoder objects (.ltx) is well established in Sterling documentation and has been emphasized in studies of integration workflows [1]. Translation objects drive most end-to-end mappings, particularly when aligning X12 or EDIFACT messages with internal flat files or XML schemas. XML encoder objects, on the other hand, function as preliminary steps, often converting delimited or fixed-width data into an XML structure before further processing [2]. This duality allows organizations to separate structural normalization from business-specific logic.

Several authors point to the increasing reliance on rule systems within the editor to manage complex partner specifications. Standard rules support data manipulation functions such as trimming, padding, and concatenation. Extended rules, however, enable conditional logic and looping that cannot be achieved through simple field-to-field links. Case reports show that extended rules are frequently employed in EDI scenarios involving hierarchical loops, such as HL segments in X12 transactions, where partner requirements vary in depth and repeat counts [3]. IBM support articles from 2019 through 2021 document common errors resulting from misapplied loop rules and highlight the importance of scoping rules to the correct iteration [4].

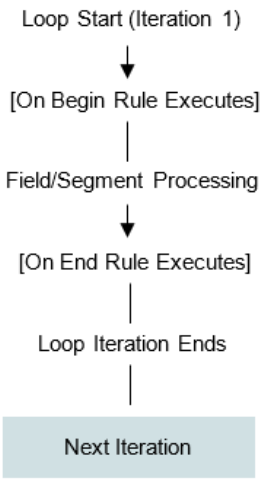

Figure 2: *Extended Rules Lifecycle Points*

Testing strategies have also received significant attention. Remote Map Test, introduced in Sterling B2B Integrator 6.2.1, allows developers to submit compiled maps directly to the server for evaluation. This approach reflects production behavior more closely but requires system access and administrator approval. By contrast, local testing through the Standards Processing Engine (SPE) provides faster iterations and is often used during the early design phase [6]. Comparative studies between 2018 and 2020 recommend combining both methods: local SPE tests for syntax and structural errors, followed by remote server tests to validate runtime integration [6].

Outside of Sterling's own documentation, broader literature on Extract, Transform, Load (ETL) methodologies offers insight into testing practices. A 2020 report from the U.S. Department of Health and Human Services stressed the importance of verifying data mappings when integrating healthcare common data models, a challenge that mirrors the requirements of EDI-to-XML conversions [9]. Similarly, research on FAIR data management principles emphasized transparency in mapping definitions and traceability of transformations, advocating for methodologies that SB2Bi users can adapt [10].

Non-EDI mapping, particularly CSV-to-XML or fixed-width conversions, has been studied as a stepping stone toward broader XML-driven pipelines. Authors have noted that using XML encoder objects in SB2Bi simplifies downstream processing, as it aligns diverse inputs into a consistent structure [2]. This perspective aligns with ongoing academic discussions on XML schema validation and its role in reducing transformation errors [11].

Finally, governance emerges as a crucial topic in both technical guides and academic articles. IBM's own change logs in 2021 and 2022 reference improvements to quality checks within the Map Editor, emphasizing better error reporting and rule validation [8]. Complementary literature on data integration stresses version control, repeatability, and auditable processes as central to sustainable mapping practices [12].

In sum, the literature suggests that success with SB2Bi Map Editor depends on: (a) clarity about which artifact type is most appropriate for a given task, (b) disciplined use of standard versus extended rules, (c) layered testing strategies that balance speed and fidelity, and (d) governance mechanisms that ensure consistency and reliability over time.

3. Problem Statement

Despite the maturity of IBM Sterling B2B Integrator (SB2Bi) and the breadth of documentation available, organizations continue to encounter recurring obstacles when creating and validating EDI and non-EDI maps. These challenges stem from both technical and governance aspects of the mapping process. The following subsections outline the key problem areas that this study addresses.

3.1. Artifact Selection and Misalignment

The Map Editor generates two primary artifact types: translation objects (.txo) and XML encoder objects (.ltx). Practitioners frequently face confusion about which artifact type is best suited for a given integration scenario. Misuse often results in redundant processing steps or failure to meet partner requirements. For example, applying an XML encoder object where a translation object is required can leave business-specific rules unenforced, creating discrepancies between intended and actual outcomes [1], [2].

3.2. Complexity of Extended Rule Management

While standard rules handle straightforward operations, extended rules enable conditional logic, looping, and database lookups that are essential for sophisticated EDI flows. However, their flexibility also introduces significant room for error. Misapplied loop scoping, improper use of qualifiers, or incorrect iteration control can generate inconsistent outputs across partner transactions. Industry reports between 2018 and 2022 note that such errors are difficult to detect early, as they may only manifest under specific trading partner data sets [3], [4].

3.3. Inadequate Testing Practices

Testing in SB2Bi relies on two mechanisms: Remote Map Test (executed against the server) and local Standards Processing Engine (SPE) evaluations. Both are effective within their limits, yet many teams do not apply them systematically. Remote testing is often bypassed due to access restrictions, while local testing can fail to replicate production conditions. This fragmented approach increases the risk of defects surfacing only after deployment, leading to costly corrections and potential non-compliance with trading partners [6].

3.4. Governance and Maintainability Challenges

Beyond technical design, map management raises issues of accountability and long-term

sustainability. Without structured version control and consistent check-in/check-out procedures, teams struggle to track changes, compare historical rules, or roll back defective iterations. Research highlights that insufficient governance exacerbates technical debt, reduces auditability, and undermines partner confidence in integration reliability [8], [12].

4. Solution

Effective use of IBM Sterling B2B Integrator (SB2Bi) Map Editor requires a systematic approach that links artifact choice, rule management, testing practices, and governance. Addressing each of these areas ensures greater accuracy in transformation logic and reduces deployment risks.

4.1. Clear Artifact Selection Criteria

Organizations should adopt formal guidelines for deciding between translation objects (.txo) and XML encoder objects (.ltx). Translation objects are best suited where business rules, conditional mapping, or multi-format translation is required. XML encoder objects should be reserved for scenarios where non-XML inputs, such as delimited or positional data, need structural normalization before subsequent processing [1], [2]. Clear documentation and decision trees can minimize misuse by making the rationale transparent to all stakeholders involved in map development.

4.2. Structured Use of Extended Rules

Extended rules should be governed by coding standards that emphasize scope control, readability, and reuse. Loop rules must be explicitly tied to segment occurrences, particularly in hierarchical EDI messages such as X12 HL loops. Development teams can further reduce error rates by maintaining a shared library of validated rule snippets for common operations—such as date formatting, counter resets, or conditional element suppression [3], [4]. This approach balances flexibility with consistency, ensuring that advanced rules add value without creating hidden risks.

4.3. Layered Testing Framework

A dual-stage testing methodology addresses the weaknesses of relying on a single testing mode. Local testing with the Standards Processing Engine (SPE) should be used for rapid iterations, syntax validation, and unit-level checks. Once structural soundness is confirmed,

the Remote Map Test should be applied to replicate production behavior and capture runtime-specific issues [6]. Incorporating both levels of testing into continuous integration pipelines ensures that every revision undergoes rigorous validation before deployment.

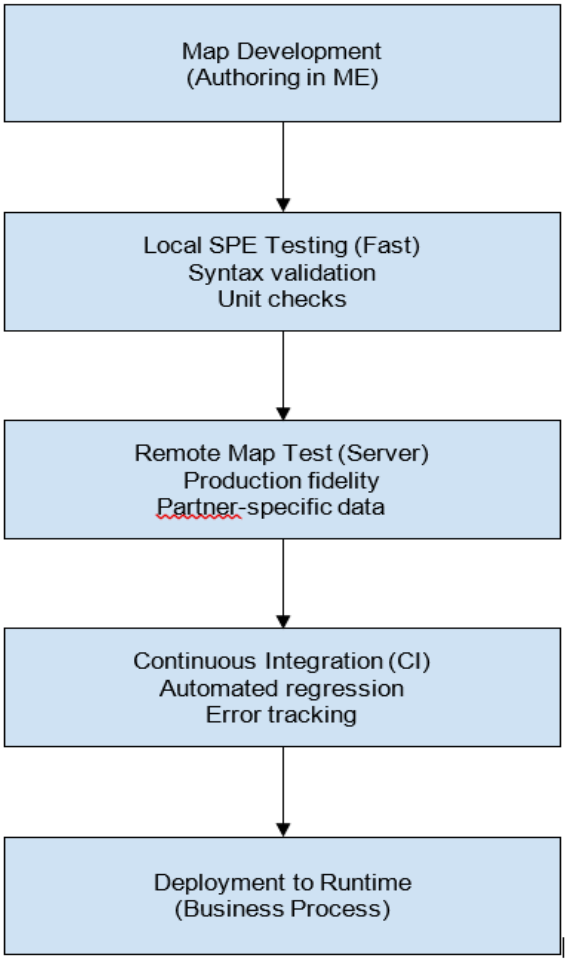

Figure 3: *Testing Workflow Integration*

4.4. Governance Through Version Control and Auditability

To address long-term maintainability, teams should integrate map development into organizational version control systems while continuing to use Sterling's built-in check-in/check-out features. Each map version should be accompanied by descriptive metadata, including author, change rationale, and linked partner specifications [8], [12]. Governance policies should also require periodic reviews of active maps to retire obsolete versions and reduce technical debt. Such practices improve transparency and audit readiness, fostering

stronger confidence in partner relationships and internal compliance frameworks.

5. Recommendations:

The study identifies several practices that can help organizations make better use of IBM Sterling B2B Integrator (SB2Bi) Map Editor for both EDI and non-EDI transformations. These recommendations are designed to translate solution principles into operational strategies.

5.1. Adopt a Decision Framework for Map Artifacts

Enterprises should formalize a decision framework that clearly distinguishes when to use translation objects (.txo) and when to use XML encoder objects (.ltx). This framework should be circulated across all integration teams and reinforced through training sessions. Decision aids such as flowcharts or quick-reference guides can ensure that artifact selection becomes a routine and repeatable step rather than an ad-hoc choice [1], [2].

5.2. Institutionalize Testing within Development Pipelines

Testing should not remain a manual afterthought. Instead, both local Standards Processing Engine (SPE) tests and remote server-based Map Tests should be embedded in continuous integration pipelines. Automated validation can check for common errors such as missing loops, misconfigured delimiters, or rule failures before deployment. This approach aligns with broader industry practices that prioritize test automation in data integration projects [6], [12].

5.3. Strengthen Governance Through Versioning and Peer Review

Beyond the technical aspects, governance must ensure that every map revision is reviewed and auditable. Teams should enforce version control policies that link each map change to partner requirements, defect tickets, or compliance updates. Incorporating peer review sessions during map development can also reduce error rates and spread domain knowledge among staff. Over time, this cultivates a repository of well-documented, peer-validated transformation logic that reduces operational risk [8], [10].

6. Conclusion

This paper examined how IBM Sterling B2B Integrator (SB2Bi) Map Editor is applied to create and test complex data transformations across both EDI and non-EDI contexts. The

review of sources from 2018 to 2022 highlighted several recurring challenges: uncertainty over artifact selection, the risk of misapplied extended rules, inconsistent testing practices, and insufficient governance structures. These issues collectively undermine integration reliability and trading partner trust, particularly when organizations must comply with strict regulatory and contractual requirements.

The proposed solutions address these concerns by promoting clarity in artifact selection, encouraging disciplined use of extended rules, introducing a layered testing framework, and embedding governance practices into the development lifecycle. Together, these measures provide a practical foundation for more dependable and auditable mappings. The recommendations further extend this approach by encouraging organizations to institutionalize decision frameworks, automate testing within development pipelines, and reinforce accountability through version control and peer review.

Overall, the evidence suggests that organizations that combine technical precision with structured governance are more successful in deploying sustainable mapping strategies. Beyond operational efficiency, these practices contribute to stronger compliance postures and improved confidence among trading partners. Future academic research could expand on this study by conducting empirical analyses of error reduction and throughput improvements in enterprises that adopt layered testing and governance-oriented development. Such work would add quantitative weight to the qualitative findings presented here and provide a richer view of how SB2Bi Map Editor supports integration in multi-industry environments.

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