

Concepts

BuyerXpert/SellerXpert 4.1

BuyerXpert---Version 4.1, Service Pack 3

October 2001

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About This Document

This document provides a description of the basic components of the BuyerXpert/SellerXpert 4.1 product, including a functional overview and a high-level discussion of architecture and configuration.

This preface contains the following sections:

- Audience
- What's in This Document
- Documentation Conventions
- Documentation
- How to Use the Online Help
- Product Support

Audience

The audience for this document is any person who is involved in selecting, implementing, administering or working within the BuyerXpert/SellerXpert environment.

What's in This Document

The following list summarizes what each chapter covers.

If you want to know about this	See this chapter
Description of contents of this guide; listing of documentation; information on product support	“About This Document”
Description of the features of BuyerXpert/SellerXpert, overview of platform, infrastructure, and customization	Chapter 1, “What Is BuyerXpert/SellerXpert?”
Overview of the users and applications of BuyerXpert/SellerXpert	Chapter 2, “How Does BuyerXpert/SellerXpert Work?”
Description of the graphical interfaces, online help, reports, and utilities	Chapter 3, “How Do I Use BuyerXpert/SellerXpert?”
BuyerXpert/SellerXpert terminology	“Glossary”

Documentation Conventions

This document uses the following conventions:

- The `monospace` font is used for sample code and code listings, Application Program Interface (API) and language elements (such as method names and property names), file names, path names, directory names, Hypertext Markup Language (HTML) tags, and any text that must be typed on the screen.
- The *italic* font is used in code to represent placeholder parameters (variables) that should be replaced with an actual value.
- Brackets ([]) are used to enclose optional parameters.
- A slash (/) is used to separate directories in a path. (Windows NT supports both the slash and the backslash.)

Documentation

Documentation for all iPlanet products can be found online in Portable Document Format (PDF) and HTML formats at the following web site:

<http://docs.ipplanet.com/docs/manuals/>

The BuyerXpert/SellerXpert documentation set includes:

- *Release Notes*—Contains important information on the current release. Read this document before working with the new BuyerXpert/SellerXpert release.
- *Installation Guide*—Provides instructions for installing the SellerXpert product and its enabling software.

NOTE Instructions for installing BuyerXpert can be found under the BuyerXpert link at the same URL.

- *Administrator's Guide*—Provides reference information and instructions on administering a fully-installed BuyerXpert/SellerXpert system.
- Admin interface Help—Provides guidelines and instructions for using the graphical administrative interface to administer BuyerXpert/SellerXpert.
- User interface Help—Provides guidelines and instructions for performing the tasks of BuyerXpert/SellerXpert.
- Catalog interface Help—Provides guidelines and instructions for managing catalogs.

The following documentation contains additional information relevant to using this BuyerXpert/SellerXpert document:

- Actuate documentation
- *ECXpert Administration Guide*
- *ECXpert Operations Reference Manual*

How to Use the Online Help

When using BuyerXpert/SellerXpert, click Help in any window to open a page that explains the fields and components of that window. You can then navigate to other parts of Help using the Help table of contents and index.

NOTE To view the full Help table of contents listing, you may need to make your browser window larger.

Because Help is viewed in a browser window, you can use the navigational tools of the browser as well as the navigational tools within Help. For example, you can use browser commands to print, find information, and copy and paste.

Product Support

If you have problems with your system, contact iPlanet customer support using one of the following mechanisms:

- iPlanet online support web site at:

<http://www.iplanet.com/support/online/>

From this location, the CaseTracker and CaseView tools are available for logging problems.

- The telephone dispatch number associated with your maintenance contract

So that the technical support staff can best assist you in resolving problems, please have the following information available when you contact support:

- Description of the problem, including the situation where the problem occurs and its impact on your operation
- Machine type, operating system version, and product version, including any patches and other software that might be affecting the problem
- Detailed steps on the methods you have used to reproduce the problem
- Any error logs or core dumps

What Is BuyerXpert/SellerXpert?

BuyerXpert is an internet-based purchasing system that allows an enterprise to automate their procurement processes. SellerXpert is an internet-based solution that allows an enterprise to deploy a sales channel for selling to consumer and business customers. Together they provide a solid base for implementation of an e-commerce solution for an organization.

This chapter includes the following topics:

- BuyerXpert Product Overview
- SellerXpert Product Overview
- ECXpert Interface
- Customization Overview

BuyerXpert Product Overview

iPlanet BuyerXpert is an internet e-commerce application that provides centralized control for buying goods and services for enterprise operations. Since it is a business-to-business application, consumers are not usually direct users of the BuyerXpert product.

Instead, BuyerXpert is designed for use by business-level procurement professionals who are employees of buyer organizations. These buyers generally purchase items and services from catalogs owned by seller organizations on behalf of people who are employees in the buyer organizations.

Other non-procurement employees of the buyer organization can use BuyerXpert to purchase items such as office supplies, equipment, and services if the organization has authorized these employees as members of the BuyerXpert community.

The core functionality of BuyerXpert involves ordering items from electronic catalogs that are supplied to the buyer organization by seller organizations. For example, a manufacturing organization might buy parts from various parts sellers. Using BuyerXpert, a buyer for the manufacturing organization can view the catalogs for the parts sellers, select items for an order, send the order for approval, and receive the goods, all using the graphical interface of BuyerXpert.

BuyerXpert also supports purchasing services from service sellers, such as contractors or consultants. Timecards for these services can be submitted and approved for payment.

The main tasks in the BuyerXpert procurement process are:

- Browsing seller catalogs
- Creating requisitions
- Submitting requisitions and timecards for approval
- Approving requisitions and timecards
- Tracking orders
- Receiving items

After a requisition is approved, BuyerXpert electronically submits a purchase order to the seller (or to multiple sellers if the requisition is created this way).

BuyerXpert Features

Key BuyerXpert features include:

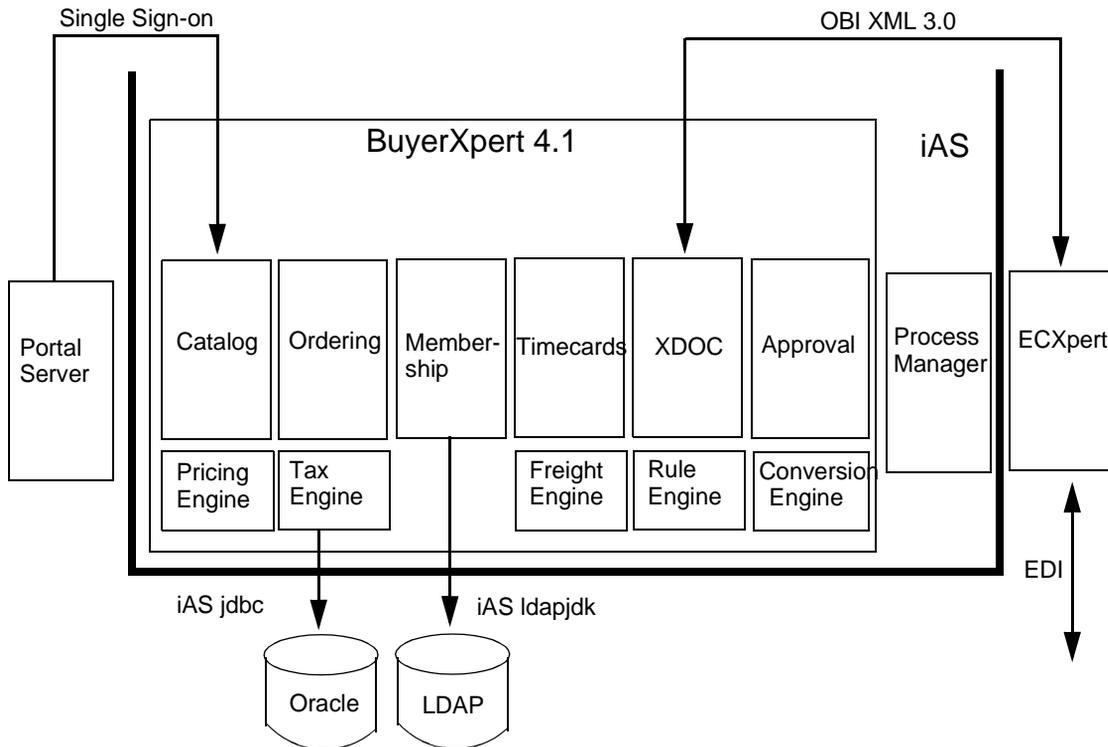
- Online seller catalogs
- Advanced search capabilities to quickly find goods in catalogs
- Automatic routing of requisitions and orders
- Notifications and reminders automatically sent by e-mail
- Scalability to support buyer company future growth
- Online tracking of purchase orders status
- Receiving of goods ordered
- Reporting capabilities
- EDI and OBI compliance

- Web portal (optional)
- Import utility
- Contract tracking
- Seller performance tracking
- Invoice matching
- Upgrade utility

These features are described in Chapter 2, “How Does BuyerXpert/SellerXpert Work?”

BuyerXpert Architecture

Figure 1-1 illustrates the BuyerXpert architecture.

Figure 1-1 BuyerXpert Architecture

BuyerXpert has a component-based architecture, consisting of a JSP servlet-based top layer, a business logic middle layer, and an engine-driven bottom layer. BuyerXpert was designed to take advantage of strengths of the various components. Those components include:

- iPlanet Portal Server—Allows you to perform a single sign-on to BuyerXpert, as well as a customized portal interface.
- iPlanet Process Manager—Handles the approval process, customizable to your organization.
- ECXpert—Accepts inbound orders and transmits outbound orders and timecards. It is also used to accept communication from sellers.
- iPlanet Directory Server—The iPlanet implementation of LDAP that stores the membership and location data.
- Oracle—Database that stores the ordering and catalog information.

- iPlanet Application Server (iAS)—Processes transactions and is the primary engine of BuyerXpert/SellerXpert.

OBI Interface

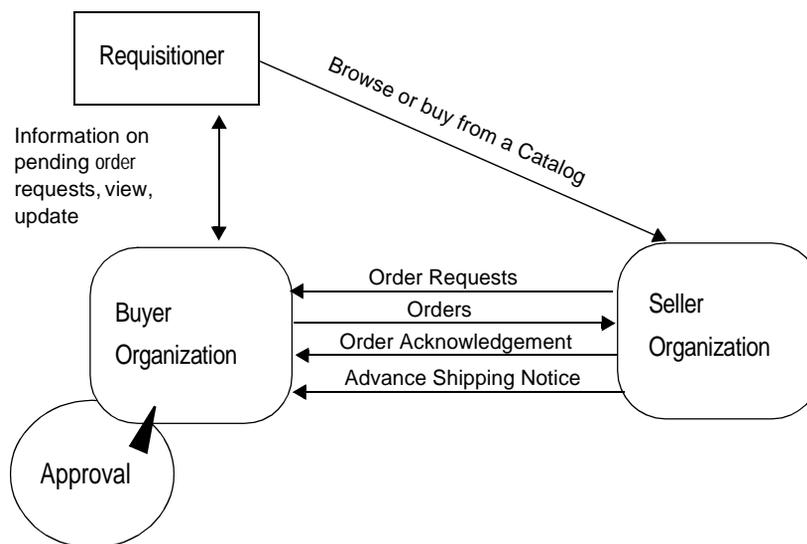
The Open Buying on the Internet (OBI) standard is an open, flexible framework for business-to-business internet commerce solutions. The purpose of the OBI specification is to provide a standard framework for secure and interoperable business-to-business internet commerce with an initial focus on automating high-volume, low-dollar transactions between trading partners.

The OBI process flow can be described as the interaction of three entities:

- A requisitioner
- A buyer organization
- A seller organization

Figure 1-2 shows how these entities interact.

Figure 1-2 OBI Process Flow



NOTE For more information, refer to the access chapter of the *Administrator's Guide*.

SellerXpert Product Overview

iPlanet SellerXpert is an internet e-commerce application that manages the key aspects of online selling, including product selection and ordering, order tracking, and customer service.

There are three types of buyers, or shoppers, in the SellerXpert environment:

- **Business-to-Business (B2B) buyer**—An organization that is permitting authorized members of the organization to shop in its name. The interface to the selling environment is controlled by an administrator who is authorized by the organization to establish rules that define the buyer's authorization limits.
- **Business-to-Consumer (B2C) buyer**—An individual customer who has registered in the selling environment. Registration involves submitting a name, address, and user preferences such as preferred language and currency, payment information, and so on.
- **Guest user**—A person who is not a member, but who can browse a catalog, add items to the shopping cart, and check prices before deciding to register as a SellerXpert B2C buyer.

The core functionality of SellerXpert involves buyers (as individuals or as members of an authorized organization) ordering items from electronic catalogs that belong to a selling organization. For example, a manufacturing organization might be in the business of selling parts to buyers from various organizations. The available parts are listed in an electronic catalog on the selling organization web site. Buyers can search the selling organization's catalog for the parts they want, select items for an order, and send a purchase order to the selling organization, all using the SellerXpert graphical interface.

After a shopping cart is checked out, SellerXpert electronically submits orders to the selling organization for fulfillment.

The main tasks in the SellerXpert selling process are:

- Browsing one or more catalogs
- Selecting items to create an order
- Verifying shipping and payment information

- Placing the order
- Tracking the status of an order

SellerXpert Features

Key SellerXpert features include:

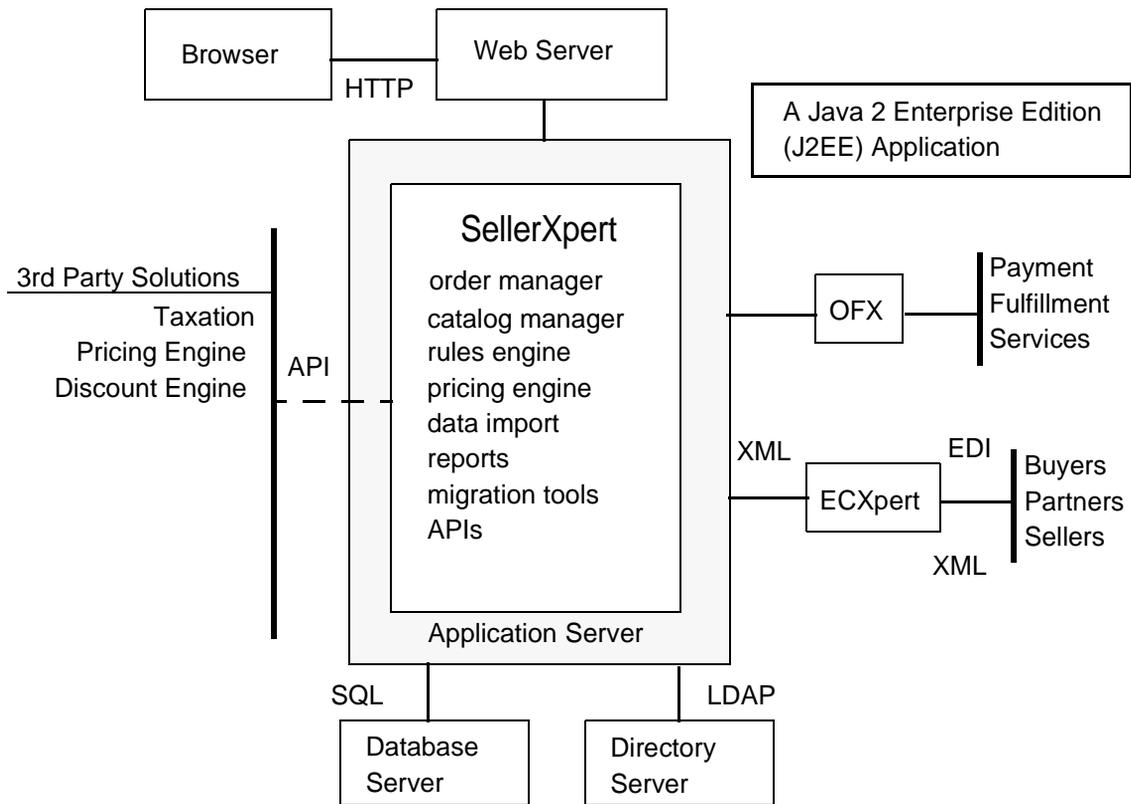
- Order management
- Search capabilities
- Customizable catalog
- Customizable business rules
- Payment services
- Import utility
- EDI compliance
- Guest login
- Sales quote
- Email shopping cart

These features are described in Chapter 2, “How Does BuyerXpert/SellerXpert Work?”

SellerXpert Architecture

Figure 1-3 illustrates the SellerXpert architecture.

Figure 1-3 SellerXpert Architecture



SellerXpert has a component-based architecture, consisting of a JSP servlet-based top layer, a business logic middle layer, and an engine-driven bottom layer. SellerXpert was designed to take advantage of strengths of the various components.

SellerXpert components include:

- ECXpert—Provides communication between SellerXpert and the legacy systems of the selling organization.
- iPlanet Directory Server—The iPlanet implementation of LDAP that stores the membership and location data.
- Oracle—Database that stores the ordering and catalog information.

- iPlanet Application Server (iAS)—Processes transactions and is the primary engine of BuyerXpert/SellerXpert.

ECXpert Interface

ECXpert provides the foundation for order submission, and the communication between customer legacy systems and BuyerXpert/SellerXpert.

The interface with ECXpert allows the following:

- Support for the American National Standards Institute (ANSI) ASC X12 and other standards
- Use of a graphical tool for any-to-any mapping, and translation to convert any file format, such as Electronic Data Interchange (EDI), to any other file format
- Support for the Simple Mail Transfer Protocol (SMTP) and Secure Multipurpose Internet Mail Extensions (S/MIME)
- Storage of documents, tracking services, and management tasks
- Secure transmission of data over public and private networks
- Use of certified interfaces for Oracle applications
- Legacy integration, with batch scheduling, and robust communications capabilities to interface with mainframe operating systems, UNIX, or NT

NOTE For more information, refer to the *Administrator's Guide* and the ECXpert documentation.

Customization Overview

BuyerXpert/SellerXpert can be customized on two levels:

- Administrator-level customizations—customizations that can be done by a non-programmer, typically the BuyerXpert/SellerXpert administrator
- Developer-level customization—customizations that must be done by a programmer

Administrator-Level Customizations

Administrator customizations generally affect the system settings or look and feel of the product and do not affect the underlying code.

Typical administrator customizations include:

- Modifying the look and feel of the product by changing such elements as company logo, colors, fonts, or adding graphics or text
- Modifying system elements, such as time-out and reminder parameters, login elements, or the text for error messages
- Creating additional information fields (AIFs)

Developer-Level Customizations

Developer customizations can affect any part of the SellerXpert or BuyerXpert system.

Typical developer-level customizations include:

- Adding new fields to a data object
- Adding new fields to the import file for ECXpert
- Creating new reports; modifying existing reports

NOTE For more information, refer to the customizations chapter of the *Administrator's Guide*.

How Does BuyerXpert/SellerXpert Work?

The following sections are contained in this chapter:

- BuyerXpert/SellerXpert People
- BuyerXpert/SellerXpert Components

BuyerXpert/SellerXpert People

There are a number of people in the organization who are involved with BuyerXpert/SellerXpert:

- Users
- Administrators
- Approvers (BuyerXpert Only)

Users

In the BuyerXpert environment, users are procurement professionals or other employees of the buyer organization who are buying items from catalogs that belong to other organizations. These catalogs are hosted in the buying organization's environment.

In the SellerXpert environment, users are either B2C individuals who buy items on their own, or B2B individuals who are authorized to shop for items for their organization. These users go to seller sites where SellerXpert allows them to select and order items in the catalogs that are hosted by a seller organization.

A *buyer* is a member of the BuyerXpert or SellerXpert community who can request sales quotes, browse a catalog, place an order, and track purchases.

NOTE For SellerXpert, a buyer can log in as a guest without being an established member.

Typical buying sequence:

1. A buyer logs into the web browser interface.
2. The buyer searches available catalogs and selects items to buy.

NOTE For SellerXpert, if the user is logged in as a guest, the user must register before checking out.

3. The buyer reviews selections and continues shopping.
4. The buyer begins the checkout process.
5. The buyer is prompted to confirm checkout; a message is displayed when the checkout is successful.
6. For SellerXpert, the order is electronically submitted to the seller for fulfillment.
For BuyerXpert, the requisition is electronically submitted for approval. After approval, it is submitted as an order to the seller.
7. The buyer can view order details and track the order.

Administrators

An administrator is an employee of the buyer or seller organization who performs such administrative tasks as:

- Installing and upgrading the product
- Starting up and shutting down the systems and components
- Setting up access control to BuyerXpert/SellerXpert resources
- Defining the members within a buyer organization and assigning privileges associated with that organization
- Administering electronic catalogs

- Managing the BuyerXpert/SellerXpert data, including creating, updating, and deleting data using the graphical interfaces or Import utility

An organization can have more than one administrator. For example, one administrator may be responsible for maintaining catalogs, while another administrator may be responsible for maintaining member profiles for the organization.

Administrator Roles for the Multi-Organizational Structure

BuyerXpert/SellerXpert administration is a multi-tiered process that works through privilege levels associated with three distinct administrator roles: the superadmin, the orgadmin, and the selfadmin. These roles are assigned during BuyerXpert/SellerXpert implementation.

- *Superadmin* (super administrator)—Can do all that is possible through the administrative utilities and interfaces of BuyerXpert/SellerXpert, including interactive administration and importing data. The superadmin has full create-read-update-delete privileges across organizations. This role has no administrative restrictions.
- *Orgadmin* (organization administrator)—Can administer various resources within the domain of the orgadmin’s organization. An orgadmin has full create-read-update-delete privileges within an organization.
- *Selfadmin* (self administrator)—Can administer only self and self-related entities and attributes. This is the most restrictive role and is the default.

BuyerXpert/SellerXpert determines what a particular administrator can do with a resource by consulting the privilege table for that resource.

NOTE For further information on resources and privileges, refer to the resources chapters and appendix in the *Administrator’s Guide*.

Approvers (BuyerXpert Only)

An *approver* is an employee of the buyer organization who is responsible for reviewing and approving requisitions that are created using BuyerXpert. There can be a number of approvers in the approval cycle for a particular organization. This cycle is set up by the superadmin in an approval matrix.

The types of approvers are:

- Hierarchical approver—person who manages the buyer who created the requisition; could include a hierarchy of managers above the buyer

- Commodity approver—person who is responsible for a particular category of products or services in the organization, such as office supplies or computer equipment
- Cost center approver—person responsible for a particular cost center or department of the organization
- Approver pool—a group of users, any or all of whom can function as the approver, depending on the approval chain of the organization
- Off-catalog approver—person who determines what to purchase if an item cannot be ordered through a catalog

Approval authorization can be delegated to another BuyerXpert member if the organization approval matrix is set up to allow delegation.

NOTE Further information can be found in the BuyerXpert online Help and the resources setup chapter of the *Administrator's Guide*.

BuyerXpert/SellerXpert Components

The components that form the processing framework for BuyerXpert and SellerXpert are:

- Multi-Organizational Structure
- Access Control
- Membership
- Business Rules
- Catalog Manager
- Order Process
- Contract Tracking
- Guest Login (SellerXpert Only)
- Sales Quote (SellerXpert Only)
- Email Shopping Cart (SellerXpert Only)
- Approval (BuyerXpert Only)
- Receiving (BuyerXpert Only)

- Supplier Performance (BuyerXpert Only)
- Invoice Matching (BuyerXpert Only)
- Timecard Process (BuyerXpert only)

Multi-Organizational Structure

BuyerXpert/SellerXpert provides a multi-organizational approach that allows unique business rules to be applied to subdivisions of an enterprise. That is, within a single instance of BuyerXpert/SellerXpert, an enterprise can be divided into multiple organizations or divisions, each of which can have unique access control, catalogs, price lists, locales, currencies, bill-to and ship-to locations, adjustments, and payment methods.

Multi-locale and multi-currency functionality allows great flexibility in tailoring BuyerXpert/SellerXpert to the specific profile of your organization.

Multi-Locale

The term *multi-locale* refers to the situation where multiple locale presentations can be used simultaneously within one BuyerXpert/SellerXpert system. For example, one user may be using French and another German.

Locale settings include:

- Language and/or language variant (fr / de / en-us / en-uk)
- Number and date formats
- Page layout—required to handle string expansion and/or text that reads in directions other than left-to-right, top-to-bottom.
- Graphics—different graphics may be needed due to page layout or cultural differences

The locale is independent of the currency, and the currency is independent of the locale. For example, locale doesn't determine how many significant digits are shown, and the currency doesn't determine the number format.

Multi-Currency

The term *multi-currency* refers to support for multiple currencies (Euro, USD and others) within one BuyerXpert/SellerXpert system. With multi-currency functionality, the preferred currency can be displayed for:

- Graphical interfaces

- Orders
- Reports

NOTE Refer to the *Administrator's Guide* for more information.

Access Control

A *business community* is a hierarchy of organizations, organizational units, users, user groups, and locations. For BuyerXpert/SellerXpert, this hierarchical model is represented in the directory structure of Lightweight Directory Access Protocol (LDAP).

The *security policy* for a business community is a defined, administered, reconciled plan, based on the hierarchical model of the particular business community. A security policy includes access control mechanisms that are used to protect resources from unauthorized access and manipulation. There are three primary goals of any security system:

- **Confidentiality**—Data cannot be viewed by members who are not intended to view it.
- **Integrity**—Data cannot be modified by members who are not intended to modify it.

Integrity depends on the principle of least privilege, that is, a member is given no more than the minimum privilege required to perform a task, as opposed to trusting the member's good intentions.

- **Accountability**—All relevant access and modification events should be capable of being logged for future auditing and verification purposes.

Privileges

In a security system, authentication involves verification of the identity of a member by a trusted system. Authentication is about *who you are*. Authorization involves verifying the actions that are allowed for that particular member. Authorization is about *what you can do*.

Assigning privileges to a member is how that member's access to resources is determined. A privilege level can be made up of a number of *permissions* that specifically define what a member can and cannot do in particular circumstances. A permission is constructed using the resource name, the member identification, and the action name.

Access to Resources

A *resource*, also known as a business object, is typically a piece of business data, such as a record in a database. The manipulation of resources involves the performance of a business task, such as creating an order, by a person who is a member of the BuyerXpert/SellerXpert business community.

NOTE See the *Administrator's Guide* for more information on access and resources.

Membership

Members are participants in the BuyerXpert/SellerXpert system and have permission to access particular BuyerXpert/SellerXpert functions and data. The concept of members is not restricted to users. In addition to buyer and seller organization people, members include the buyer and seller organizations, user groups, organizational units, and locations for shipping, receiving, and payment information.

Membership refers to the roles, permissions, and authorizations associated with each member. When BuyerXpert or SellerXpert is set up, the administrator creates a unique user ID and password for each user, as well as each user's membership profile.

BuyerXpert/SellerXpert members are:

- Organizations
- Organization units
- Users
- User groups
- Locations

Organization

An *organization* is a company, government body, or institution that participates in the buying or selling process. This includes the buyer organization, the seller organization, the shipper organization, and so on.

An organization represents a collection of users, locations, sub-organizations, organizational units and user groups that carry on the day-to-day business operations. An organization can have unique access control, catalogs, price lists, locales, currencies, bill-to and ship-to locations, business rules, adjustments, and payment methods.

At the top of its domain, the organization forms the root of the membership hierarchy.

NOTE In the BuyerXpert/SellerXpert multi-organizational environment, there can be many organizations, each with their own domains.

Organizational Unit

An *organizational unit* is a grouping of users, usually along a specific line of work in the day-to-day operation of the organization. An organization can be divided into one or more organizational units, each of which can be further be subdivided into more organizational units (nesting).

An organizational unit can have unique locations and catalogs.

A user does not have to belong to an organizational unit, but *cannot* belong to more than one.

User

Users are people who belong to an organization and perform the day-to-day tasks within the procurement enterprise. Buyers, sellers, and administrators are all users.

Users have differing privileges, based on the requirements of the organization and enforced by the membership hierarchy and access control directives. User permissions can be based on organization, organizational unit, and/or user group.

Although users can only belong to a single organizational unit (or none), they can belong to many user groups.

User Group

A *user group* is a role-based grouping of users within an organization that has its own business rules and access control policies. User groups are used primarily to define roles among users, such as setting privileges for a group of users rather than setting these privileges separately for each individual.

In many ways, user groups resemble organizational units, but organizational units have stricter limitations regarding user membership. Unlike organizational units, a user can belong to many user groups.

User groups cannot be divided into sub-user groups.

Location

A *location* represents a destination point for shipping, receiving, billing, and so on. BuyerXpert/SellerXpert locations include:

- Shipping location (Ship-From, Ship-To addresses)
- Billing location (Bill-To address)
- Pay-to location
- Send-to location

These locations could have the same physical address, or could all have different addresses.

NOTE See the resources chapters in the *Administrator's Guide* for more information.

Business Rules

Business rules are configurable, generalized statements that define the specifics of applying processing methods to a particular set of data. Business rules determine privileges, acceptable processes, relationships between BuyerXpert/SellerXpert participants, and defaults. The business rules semantics are not as complex as a full programming language, so programming experience is not required to perform typical configurations.

Business rules determine such things as:

- Relationships between buyer and seller organizations
- Applicability of business processes, such as buying with credit cards
- Choices and default values for options, such as ship-to address or payment methods

Example

Rule instance named LINE_DISCOUNT:

Buyer==AOL & Seller==Sun & Product==Computers => Line Discount=10%

This example rule is made up of a number of elements that state if the buyer organization is AOL, the seller is Sun, and the product is computers, BuyerXpert/SellerXpert will apply a 10% line discount to an order.

NOTE Refer to the online Help and the business rules chapter in the *Administrator's Guide* for more information.

Catalog Manager

To make their products available to buyers, sellers organize product information into catalogs. The product information structure in a catalog is a hierarchy of categories, with items under those categories. The ways of representing this information vary from buyer to buyer, depending on the buyer profile.

Catalog management is simplified by a set of tools which allow sellers to map existing catalogs to the BuyerXpert/SellerXpert environment. Using a graphical interface or a batch update process, sellers can organize and import their catalog data for the BuyerXpert/SellerXpert environment. After a catalog is imported and a master catalog is created, buyer organizations are able to create private buyer catalogs for specific groups within their organizations. This allows buyer organizations to control excessive and maverick spending.

Catalog Manager allows for quick, real-time catalog creation and maintenance by providing the following product catalog-related capabilities:

- Creation of seller-managed content through an internal product catalog system
- Graphical interface for catalog design and product classification
- Support for schema to follow United Nations Standard Products and Services Codes (UNSPSC), or other structure, if desired
- Access to remote seller-managed web-based content via OBI standard (BuyerXpert only)

Users who have browsing privileges can browse the buyer catalogs created for their user groups. A buyer searches and locates catalog items, views item details, compares catalog items, picks and adds catalog items to an electronic shopping cart, and creates orders.

Catalog Manager enables the following:

- The administrator can create and maintain a standardized structure (master ontology) that maps catalog data to the BuyerXpert/SellerXpert environment.

- The administrator can manage catalog data using the Catalog Manager graphical interface or the batch process Import utility.
- The administrator can create and manage group-specific buyer catalogs.
- The administrator can add items to seller catalogs and manage catalogs online.
- Users can perform advanced, keyword, and parametric searches on catalogs and perform side-by-side comparisons of items.
- Users can generate orders.

NOTE Further information and procedures are contained in the Catalog interface Help and in the catalog chapter of the *Administrator's Guide*.

Guest Login (SellerXpert Only)

Guest login allows guest users to enter the storefront and perform many operations, such as browsing the catalog, adding items to the shopping cart, and checking for prices. The option to open an account and register is available at any time. After registration is complete, the guest user is returned to the same screen to continue shopping.

Sales Quote (SellerXpert Only)

A *sales quote* is a snapshot of a shopping cart that is saved for a specific number of days as determined by the business rules. This quote is a legally binding price quotation and can be viewed at any time. You can repurchase as many times as you like using the same quote, as long as the quote is still valid.

Email Shopping Cart (SellerXpert Only)

The *email shopping cart* feature allows you to send the details about a shopping cart to a specified email address. The quantity, item description, cost, order number, and any message you want to add is sent to the recipient.

Order Process

The order process handles the core processing of orders, including creating sales quotes, placing orders, and tracking order status. Using data from business rules, member profiles, product lists, price lists, default order settings, and calculation formulas, the order process assembles first a requisition, then an order that is ready to be sent to the backend system of the seller organization.

You can configure the BuyerXpert/SellerXpert order process to:

- Create orders by browsing catalogs
- Determine contract pricing with discounts, charges, allowances, and promotions
- Allow contracted purchases
- Estimate freight charges based on shipping point and carrier selection
- Support credit and check (bank account) payment methods
- Search by full or partial shipment of goods
- View order status updates
- Support repeat order templates and multiple orders in progress

NOTE Refer to the Admin interface Help and the *Administrator's Guide* for more information.

Contract Tracking

Contract tracking provides the ability to associate a line item on a requisition with any contracts indicated by the contract identifier code(s) for that item. The requisitioner can click a link to display a contract document.

Approval (BuyerXpert Only)

The BuyerXpert approval process is a series of pre-defined approval tasks through which a purchase requisition is routed. The desired action is the approval of the requisition; the tangible result is a purchase order (approved) that can be sent to a seller for fulfillment.

NOTE The approval process is implemented using the iPlanet Process Manager application. For further information on Process Manager, refer to the Process Manager documentation and the *Administrator's Guide*.

The approval process performs the following:

- Adheres to a rule-based process flow as determined by your organization. A process flow is a set of procedural steps that establish approval paths.
- Determines which process steps to take based on the person who creates the requisition. This allows different process sequences to occur for different users and organizations. Approval pools can be designated.
- In conjunction with a specific process flow, evaluates a requisition based on such data as purchase amount and employee role to create an approval case made up of one or more process instances.
- Routes requisitions according to an approver matrix, which is based on:
 - Accounting code to which a line item is allocated
 - Commodity code associated with a product
 - Other line item details
- Sends notification emails throughout the approval process.
- Delegates approval authority according to an approval delegation table.

Receiving (BuyerXpert Only)

The BuyerXpert receiving process provides the following capabilities:

- Either desktop or centralized receiving
- Delivery package tracking and searching by order number
- Partial or full receipt capability by line item

- Over- or under-receiving capability

When the items ordered arrive from the seller, the following information is captured by the receiving process:

- Date received
- Quantity received, either full amount or partial amount
- Condition of the items

The delivery package is tracked by purchase order number. You can search receipts by purchase order number, status, and so on.

A seller may deliver a partial order. That is, some items on the order are delivered and some items are not, or the quantity of an item is only partially delivered, with the rest to arrive later.

Receiving status on a line item is either fully received or partially received. After an order is either fully received or partially received, the order cannot be cancelled. The receiving process allows you to query what quantities or items are received thus far. The receiving history shows the date and quantity of items received on a purchase order.

NOTE Further information can be found in the BuyerXpert online Help and the *Administrator's Guide*.

Supplier Performance (BuyerXpert Only)

Supplier (seller) performance provides the ability to track and compare sellers based on criteria such as quality of goods, quality of service, and timeliness of delivery. This feature allows customers to manually enter performance data, automatically collect basic receiving data, and report on data collected.

- A user can enter quality metrics for any given line item.
- The system can be configured to support a variable number of quality fields.
- Options for each quality field are configurable, and can vary by product or commodity code.
- Automated supplier performance tracking/reporting uses Order Acknowledgement (ACK), Advanced Shipping Notice (ASN), and damaged goods reporting.

- A person other than the requisitioner can receive On Behalf Of.

NOTE Information on how to customize supplier performance is contained in the customization chapter of the *Administrator's Guide*.

Invoice Matching (BuyerXpert Only)

Invoice matching is a payment strategy whereby the recipient pays for shipped goods upon arrival only under certain conditions. Payment is authorized only if the prices and goods of the purchase order, the invoice, and the products received match. The matching process is triggered by either an invoice or a receipt.

If validation fails, the invoice is routed to an authorized user and email notification is sent.

- An authorized user can view, update, resubmit, defer, or reassign an invoice.
- An item can be invoiced, but not received, or received but not invoiced.

NOTE Information on how to customize invoice matching is contained in the customization chapter of the *Administrator's Guide*.

Timecard Process (BuyerXpert only)

The BuyerXpert timecard process provides a means for a timecard user (normally a contractor who works for the buyer organization) to electronically submit timecard information for payment approval.

Although the timecard process is initiated at the Welcome screen of the BuyerXpert User interface, it is actually outside the buy process altogether, and only uses the following functionality of BuyerXpert:

- Create a timecard
- Approve using the standard BuyerXpert approval process
- Track using the BuyerXpert track process
- Transmit using ECXpert

There is no ordering process (because nothing has been ordered from a catalog), nor is there a receiving process (because nothing is being received).

Timecard Creation

A timecard requisition is created by timecard users after timecard projects and contractor profiles have been set up by the BuyerXpert administrator. For timecard requisitions, the line items that are created by the timecard user are rows of information about the billable hours worked by the timecard user. Data entry fields include project name, type of hours (such as regular, overtime, or holiday), and the quantity of hours worked on each day of the time period, usually a week. The user can provide this information all at once, or enter partial information, then save the timecard requisition and add to it throughout the time period.

Timecard Approval

The approval process (as configured by the BuyerXpert administrator) determines who approves the timecard requisition and in what sequence. At the end of the time period, a timecard user submits the timecard to the BuyerXpert approval process.

When a user submits a timecard for approval, BuyerXpert assigns a default accounting code to each line item in the timecard, as set up by the administrator. BuyerXpert calculates the costs of the hours for a line item by multiplying the total number of weekly hours times the rate specified in the timecard project table for the specific project.

Timecard Tracking

After the timecard is submitted for approval (and, thus, formatted into a BuyerXpert requisition), it can be viewed by the timecard user and the approvers using the track option of BuyerXpert. The information the user and the approvers see is different:

- Pricing information is not displayed to the timecard user
- Approvers see the pricing information and the accounting codes that the line items are being charged to

Example

Shailesh Jones, Senior Consultant, Anderson Consulting

BuyerXpert RegularTime = 30, OverTime = 5, HolidayTime=6, Price = \$3000

SellerXpert RegularTime = 10, OverTime = 3, Price = \$840

Some_menial_task RegularTime = 3, Price = \$180

In this example, the three Price=\$ items would not be visible to the timecard creator, but would be visible to the approver.

Timecard Transmission

After approval, timecard requisitions are sent to ECXpert, where they can be mapped to the format of the buyer's legacy system and transmitted to the buyer organization.

NOTE Refer to the BuyerXpert online Help and the *Administrator's Guide* for further information on timecards.

How Do I Use BuyerXpert/SellerXpert?

The tools provided with BuyerXpert/SellerXpert include a number of graphical interfaces, each with its own login and Help system. As users log into the chosen interface, BuyerXpert/SellerXpert evaluates their membership profiles and determines which interface functions they are authorized to access. When the graphical screens appear, they display functions that the particular user is authorized to use. Functions that are not available to the user are either not displayed at all, or are and dimmed.

In addition to graphical interfaces, BuyerXpert/SellerXpert provides an Import utility (available through the Admin interface), an Upgrade utility, and a collection of reports.

This chapter contains the following sections:

- BuyerXpert Tools
- SellerXpert Tools
- Catalog Manager Interface
- Upgrade Utility (BuyerXpert Only)

BuyerXpert Tools

The suite of tools provided with BuyerXpert include:

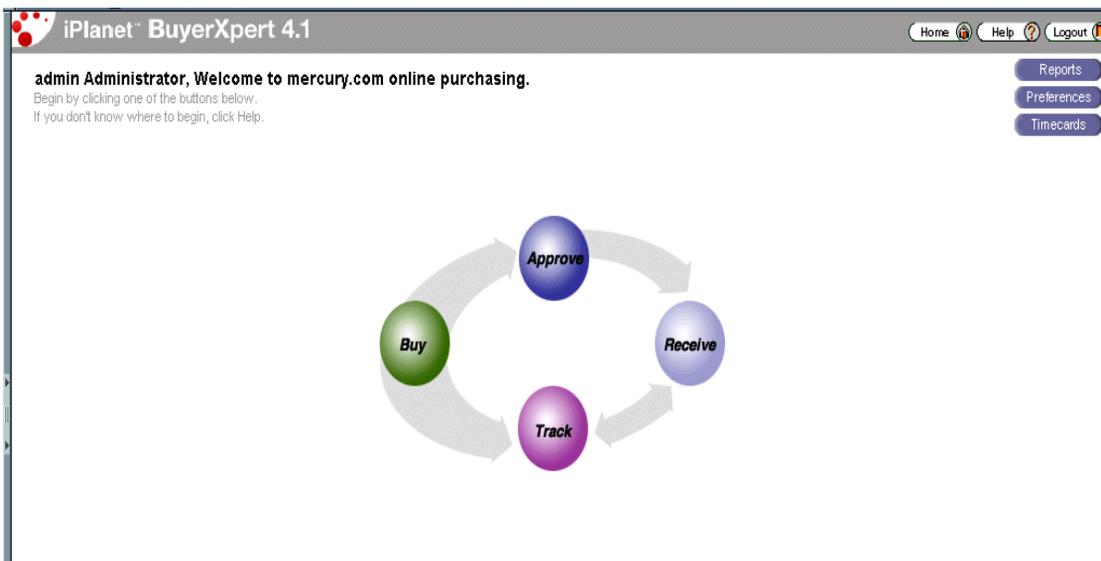
- BuyerXpert User Interface
- BuyerXpert Administrative Interface
- Import Tab

- Process Manager Interface
- BuyerXpert Reports

BuyerXpert User Interface

The BuyerXpert User interface is used to buy, approve, track, or receive goods for your organization. After login, a welcome screen appears that is similar to the screen shown in Figure 3-1.

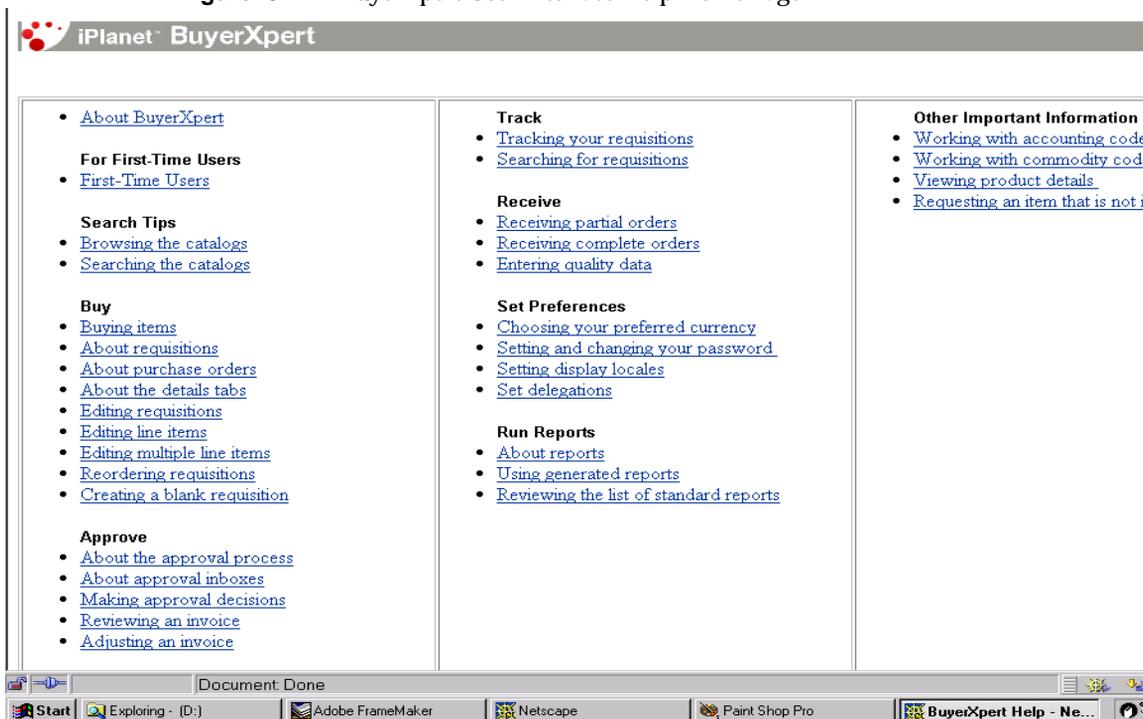
Figure 3-1 BuyerXpert User Interface



Online Help for the User Interface

For information about how to use the interface, click Help in the toolbar. The Help home page appears, as shown in Figure 3-2.

Figure 3-2 BuyerXpert User Interface Help Home Page



BuyerXpert Administrative Interface

The BuyerXpert Admin interface allows an administrator to add, delete, and update the BuyerXpert database directly using graphical screens.

NOTE To see changes, BuyerXpert must be restarted. Therefore, it is important to plan such changes when users will not be inconvenienced by the restart.

Updating data can also be done using the Import utility. While the Import utility is preferred for large amounts of data, the Admin interface is more accessible for entering or updating small quantities of data.

After you log into the BuyerXpert system, a screen appears that shows three tabs:

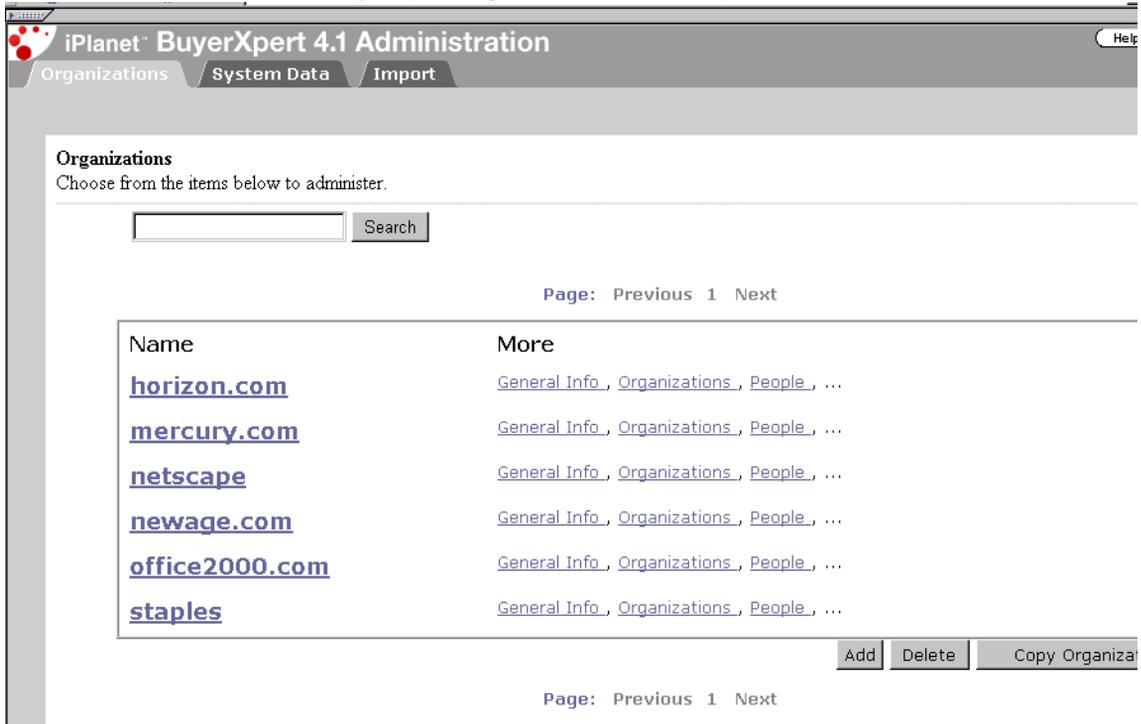
- Organizations tab
- System Data tab

- Import tab

Organizations Tab

If a superadmin logs into BuyerXpert, a screen appears that is similar to the screen shown in Figure 3-3.

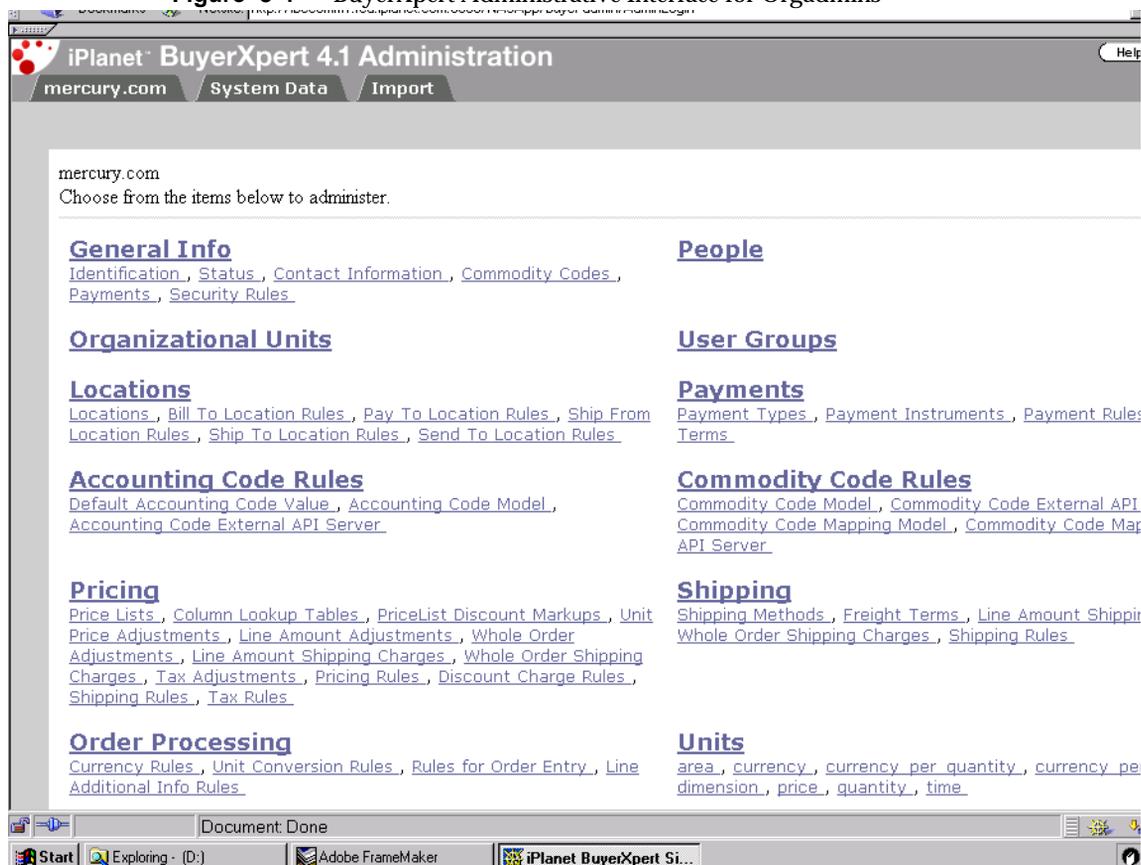
Figure 3-3 BuyerXpert Organizations Tab for Superadmin



The superadmin clicks the link to the appropriate organization, then views, updates, or adds information.

If the administrator is an orgadmin, a screen appears that is similar to the view shown in Figure 3-4.

Figure 3-4 BuyerXpert Administrative Interface for Orgadmins

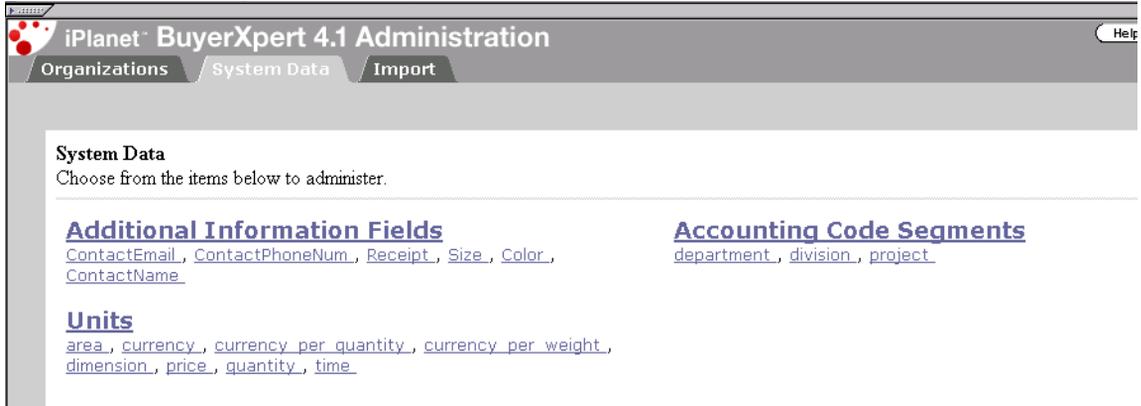


In this case, the orgadmin is logged directly into the screen for her organization. The links on this screen connect to categories for a specific organization, such as mercury.com.

System Data Tab

The System Data tab, shown in Figure 3-5, contains links that allow the BuyerXpert administrator to configure information for the entire BuyerXpert system.

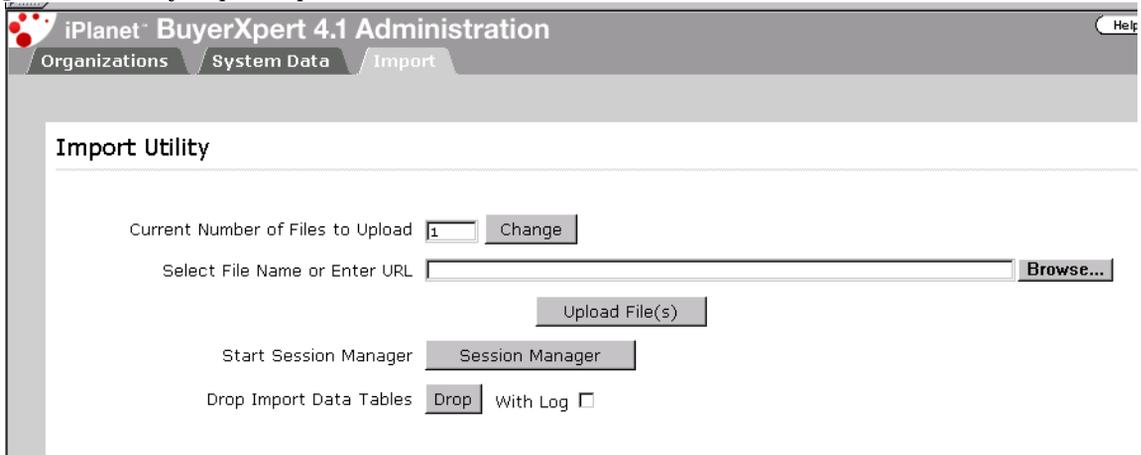
Figure 3-5 BuyerXpert System Data Tab



Import Tab

The Import utility allows the administrator to import batch data from external import data files into the BuyerXpert database. After an import data file has been created, the administrator accesses the Import utility by logging into the Admin interface and clicking the Import tab. The welcome screen for the Import utility appears, as shown in Figure 3-6.

Figure 3-6 BuyerXpert Import Tab



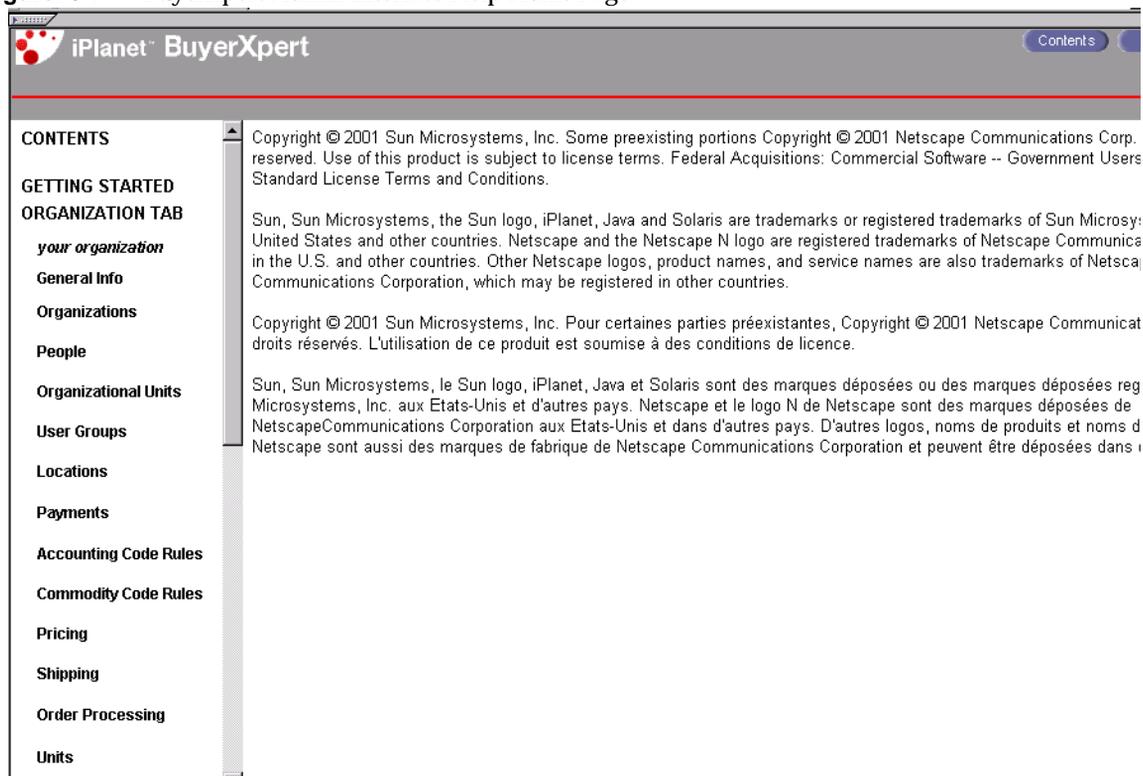
In this screen, the administrator specifies the file(s) to be imported and creates an import session that uploads the data into BuyerXpert.

NOTE Further information and procedures on importing are contained in the online Help and the import chapter of the *Administrator's Guide*.

Online Help for the Administrative Interface

For information about how to use the Admin interface, click Help at the top of the screen. The administrative Help home page appears, as shown in Figure 3-7.

Figure 3-7 BuyerXpert Admin Interface Help Home Page



To view the Help contents, click the Contents button at the top of the screen. The content topics appear in the left frame. The topics expand and collapse when clicked. That is, when you click a topic, the sub-topics appear, or disappear if they are already displayed.

When you click a Help topic, the corresponding Help text appears in the right frame. If you are new to the system, you should begin by reading the Getting Started topic.

The Glossary and Index buttons at the top of the screen provide additional information and navigation tools.

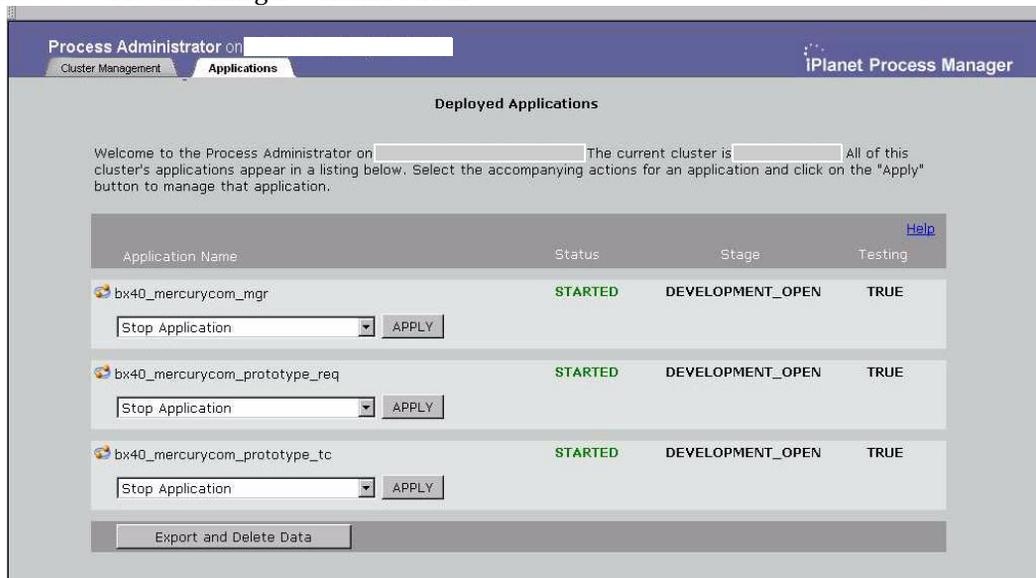
Process Manager Interface

The Process Manager interface is used by the BuyerXpert administrator when creating the approval flow for his/her organization.

The approval flow identifies how the approval process works for your organization from the time a requisition is submitted for approval until the requisition is approved (or declined) and sent as an order to the seller for fulfillment.

The Process Manager welcome screen is shown in Figure 3-8.

Figure 3-8 Process Manager Welcome Screen



BuyerXpert Reports

BuyerXpert provides the following types of reports:

- User Reports
- Manager Reports
- Admin and Superadmin Reports

These reports categories correspond to business rules that can be set at the company or person level.

NOTE For details on the contents of the reports, refer to the User interface Help. For information on configuring and writing reports, see the *Administrator's Guide*.

Table 3-1 BuyerXpert User Reports

Report Category	Report Title
Requisitions	My Requisitions
	My Approved Requisitions
	My Cancelled Requisitions
	My Declined Requisitions
Contracts	Items Per Contract
	Items Per Contract Grouped by Seller
	Orders Per Contract
	Orders Per Contract Grouped by Sellers
	Seller's Contracts
Other	Supplier's Performance
	Invoice Matching

Table 3-2 BuyerXpert Manager Reports

Report Category	Report Title
Requisitions	Requisitions by Employee
	Approved Requisitions
	Cancelled Requisitions
	Declined Requisitions

Table 3-2 BuyerXpert Manager Reports (*Continued*)

Report Category	Report Title
Spending	OrgUnit Vendor Spending
	Timecards Project Spending

Table 3-3 BuyerXpert Admin/Superadmin Reports

Report Category	Report Title
Audit Reports	Audit Report by Costcenter
	Approval Report
Performance Reports	Requisition Activity Register
	Requisition by Department- Summary
Performance Orders Requisitions	Vendor Activity Detail
Productivity	Vendor Average Order Size
Productivity Requisition	Item Requisition Activity Summary
Receiving Reports	Average Delivery Time by Product
	Average Delivery Time by Ship-to-Location
	Average Delivery Time by Vendor
	Average Delivery Time by Product Vendor
	Receive Status by Cost Center
	Receive Status by Product
	Receive Status by Requisitioner
	Receive Status by Ship-to-Location
Receive Status by Vendor	
Requisition Reports	Requisitions by Employee
	Approved Requisitions
	Cancelled Requisitions
	Declined Requisitions
	Item Requisition Activity Detail - by Amount
	Item Requisition Activity Detail - by Quantity

Table 3-3 BuyerXpert Admin/Superadmin Reports *(Continued)*

Report Category	Report Title
Spending Reports	Spending
	Org Unit Vendor Spending
	Spending by Costcenter
	Spending by Product
	Spending by Requisitioner
	Spending by Vendor
Other Reports	Item Summary Listing
	Large Purchase by Order
	Large Purchase by Item
	Small Purchase by Order
	Small Purchase by Item

SellerXpert Tools

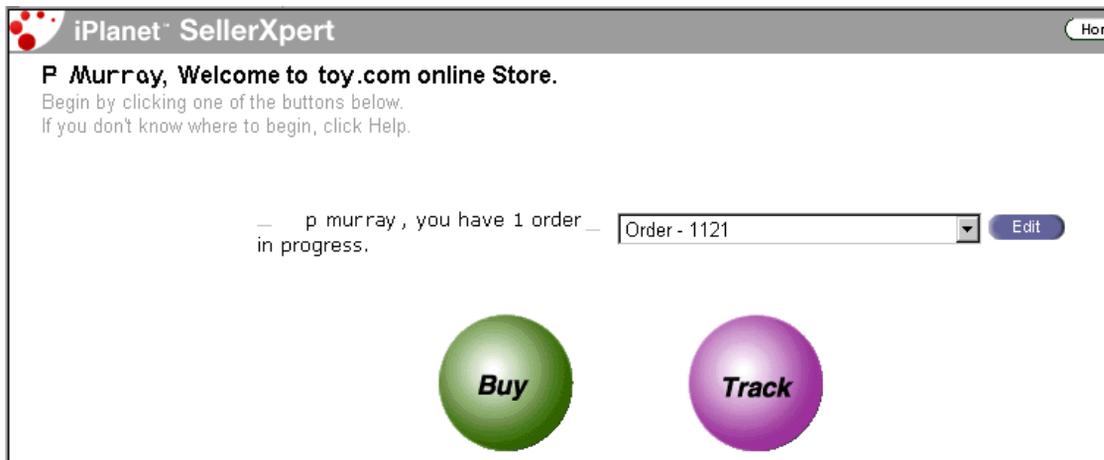
The suite of tools provided with SellerXpert include:

- SellerXpert User Interface and Help
- SellerXpert Administrative Interface and Help
- SellerXpert Reports

SellerXpert User Interface and Help

The SellerXpert User interface is used to buy products and track orders. After you successfully log into the User interface, a welcome screen appears that is similar to the screen shown in Figure 3-9.

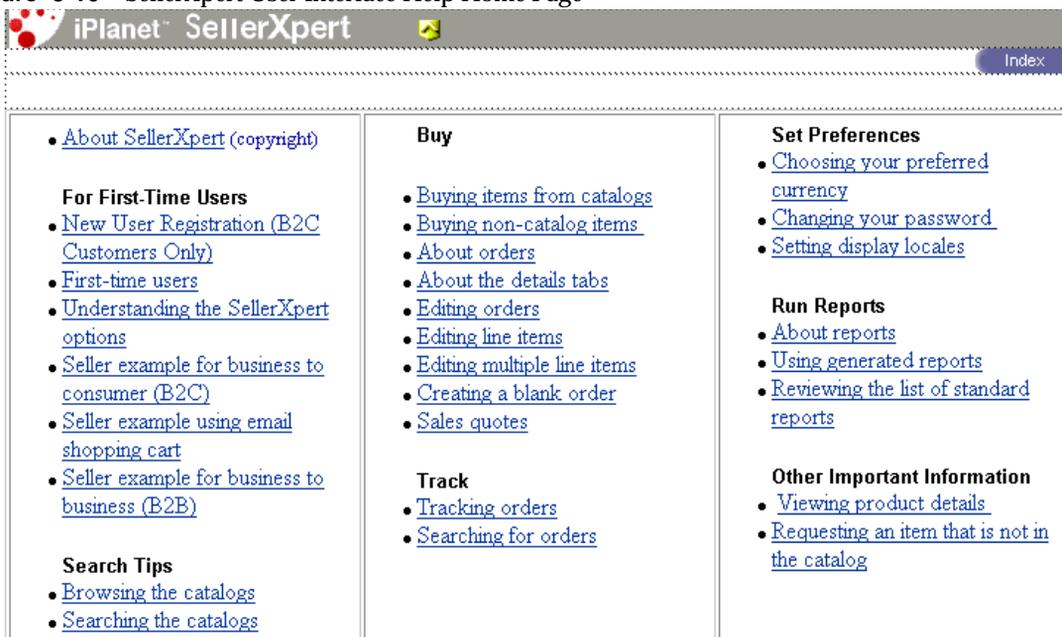
Figure 3-9 SellerXpertUser Interface



Online Help for the User Interface

For information about how to use the interface, click Help in the toolbar. The Help home page appears, as shown in Figure 3-10.

Figure 3-10 SellerXpert User Interface Help Home Page



To view the Help contents, click the Contents button at the top of the screen. The content topics appear in the left frame. The topics expand and collapse when clicked. That is, when you click a topic, the sub-topics appear, or disappear if they are already displayed.

When you click a Help topic, the corresponding Help text appears in the right frame. If you are new to the system, you should begin by reading the Getting Started topic.

The Glossary and Index buttons at the top of the screen provide additional information and navigation tools.

If you are a new user, you might find it helpful to click the First-Time Users link for an overview of the process.

SellerXpert Administrative Interface and Help

The SellerXpert Admin interface allows an administrator to add, delete, and update the SellerXpert database directly using graphical screens.

Updating data can also be done using the Import utility. While the Import utility is preferred for large amounts of data, the Admin interface is more accessible for entering or updating smaller quantities of data.

After you log into the SellerXpert system as a superadmin, a screen appears that shows four tabs:

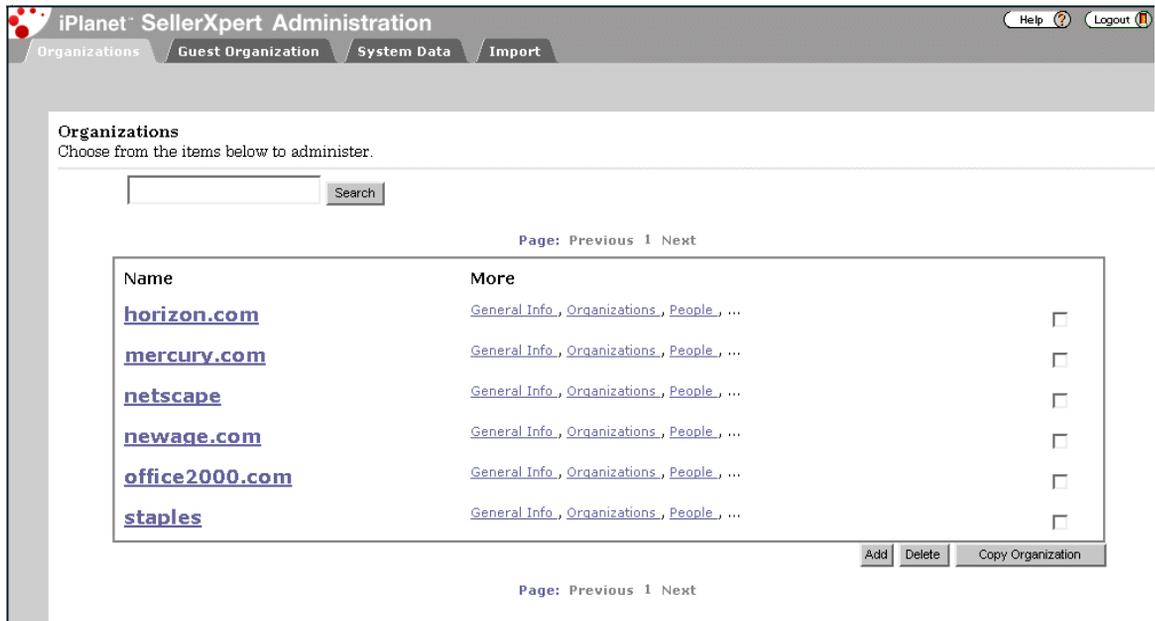
- Organizations tab
- Guest Organization tab
- System Data tab
- Import tab

NOTE An orgadmin does not see the Guest Organization tab.

Organizations Tab

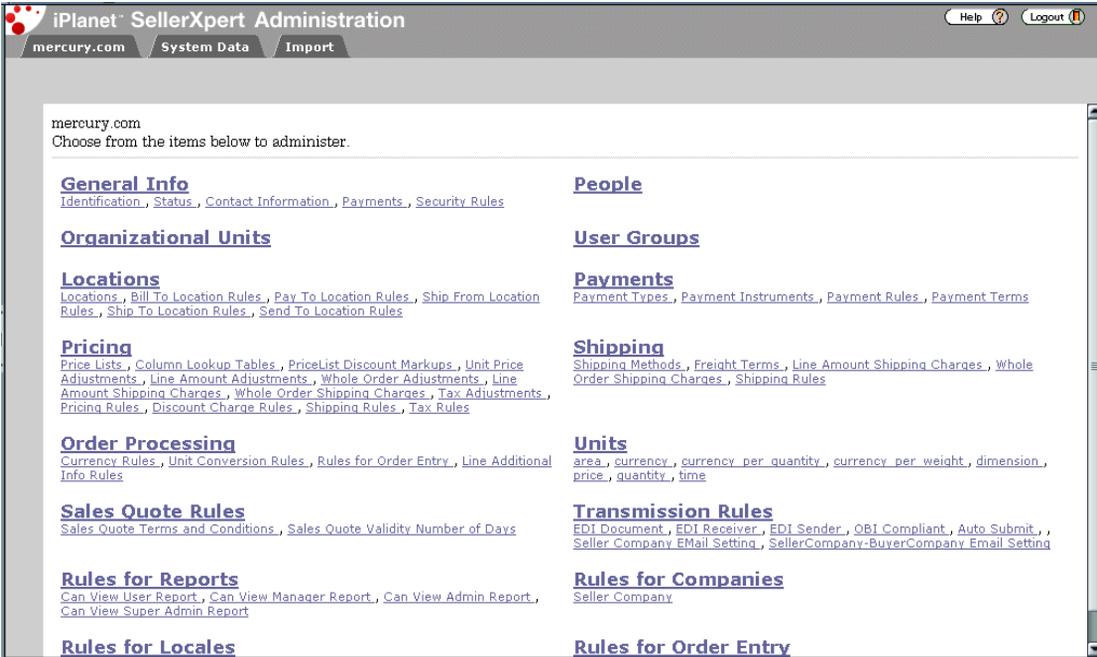
If a superadmin logs into SellerXpert, a screen appears that is similar to the screen shown in Figure 3-3.

Figure 3-11 SellerXpert Organizations Tab for Superadmins



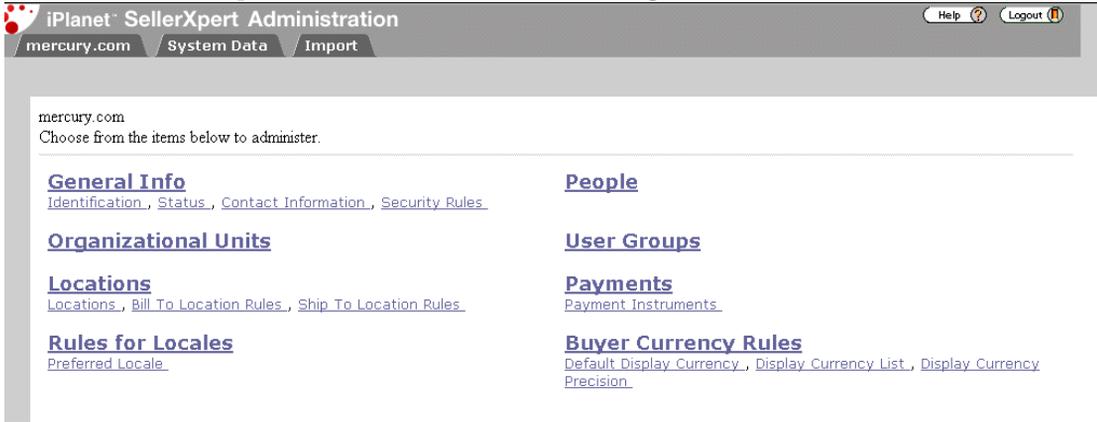
More functions are available to a superadmin than to an orgadmin. If the user is a superadmin, a screen similar to that shown in Figure 3-12 displays after a company is selected.

Figure 3-12 SellerXpert Administrative Interface for a Superadmin



If the administrator is not a superadmin, a screen appears that is similar to the view shown in Figure 3-13. The links on this screen connect to a more limited set of categories for a specific organization.

Figure 3-13 SellerXpert Administrative Interface for an Orgadmin



Guest Organization Tab

The Guest Organization tab contains listings of business-to-consumer (B2C) users and user groups.

Figure 3-14 SellerXpert Guest Organizations Tab



System Data Tab

The System Data tab, shown in Figure 3-15, contains links that allow the administrator to configure information for the entire SellerXpert system.

Figure 3-15 SellerXpert System Data Tab



Import Tab

The Import utility allows the administrator to import batch data from external import data files into the SellerXpert database. After an import data file has been created, the administrator accesses the Import utility by logging in to the Admin interface, and clicking the Import tab. The welcome screen for the import utility appears, as shown in Figure 3-16.

Figure 3-16 SellerXpert Import Tab

In this screen, the administrator specifies the file(s) to be imported and creates an import session that uploads the data into SellerXpert.

NOTE Further information and procedures on importing are contained in the online Help and the import chapter of the *Administrator's Guide*.

Online Help for the Administrative Interface

For information about how to use the administrative interface, click Help at the top of the screen.

To view the Help contents, click the Contents button at the top of the screen. The content topics appear in the left frame. The topics expand and collapse when clicked. That is, when you click a topic, the sub-topics appear, or disappear if they are already displayed.

When you click a Help topic, the corresponding Help text appears in the right frame. If you are new to the system, you should begin by reading the Getting Started topic.

The Glossary and Index buttons at the top of the screen provide additional information and navigation tools.

SellerXpert Reports

SellerXpert provides the administrator reports listed in Table 3-4.

NOTE For further descriptions of the reports, see the User interface Help. For information on configuring and customizing reports, see the *Administrator's Guide*

Table 3-4 SellerXpert Administrator Reports

Report Category	Report Title
Customer	Customer Listing Summary
	Customer Listing Details
	Customer Location Summary
	Customer People Summary
	Customer People Details
Orders	Order Payment Summary
	Order Payment Details
	Order Report Summary
	Order Report Details
Purchase Activity	Purchase Activity Summary
	Purchase Activity Details

Catalog Manager Interface

Because suppliers organize product information into catalogs, buyers need a consistent way to access products from different sellers. Catalog Manager was developed to meet this need.

The Catalog Manager interface is used by the BuyerXpert/SellerXpert administrator to:

- Create catalogs—set up a new catalog
- Create classifications for catalog items
- Create and edit catalog business rules
- Edit hierarchy

- Edit catalog items

The Catalog Manager welcome screen is shown in Figure 3-17.

Figure 3-17 Catalog Manager Welcome Screen



Upgrade Utility (BuyerXpert Only)

The Upgrade utility is a separate component used by the BuyerXpert/SellerXpert administrator to migrate data when upgrading from one version of the product to another. The following modules can be migrated using the Upgrade utility:

- Membership
- Catalog
- Order Management System (OMS)
- Commodity Codes
- Accounting Codes
- Business Rules
- Approval

Typical Data Migration Sequence

1. The Upgrade utility extracts data from a legacy BuyerXpert/SellerXpert database (CADIS or Oracle) and writes the data to an import data file.
2. The Upgrade utility passes the import data files to the BuyerXpert/SellerXpert Import utility.
3. The Import utility loads the import data files to the new BuyerXpert/SellerXpert database (Oracle or Catalog Manager).

An advantage of this multi-phase data migration process is that you can stop and start the data migration process. This is helpful when you are migrating extremely large amounts of data to BuyerXpert/SellerXpert 4.x.

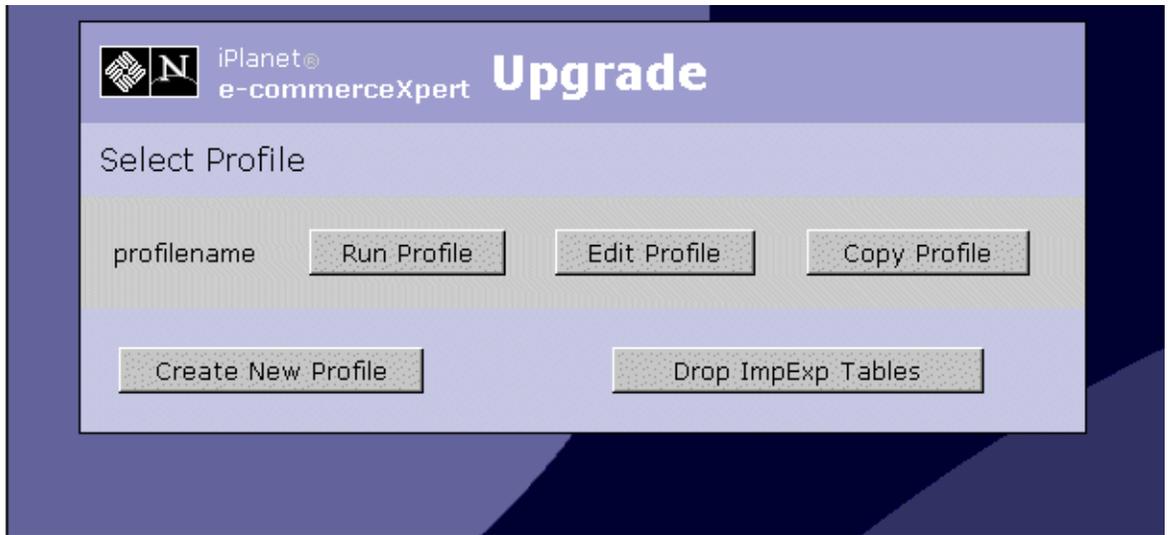
Exceptions

The data migration process varies for the following data modules:

- Catalogs—The Upgrade utility writes the extracted data to an XML import file and passes the data to Catalog Manager. At this point, the data is written to the new BuyerXpert/SellerXpert database.
- Approval Log—The Upgrade utility writes the extracted data directly to a new BuyerXpert database.

The Upgrade utility interface welcome screen is shown in Figure 3-18.

Figure 3-18 Upgrade Interface Welcome Screen



Upgrade Utility (BuyerXpert Only)

Glossary

access control Set of software mechanisms that limit and control access to host systems and applications.

access control list A list of users and their permitted access rights.

accounting code A multi-segment number that identifies the business unit (division, department, project, and so on) to be billed for an order or specific line items on an order.

actor An object (user or process) or group of objects that wants to perform an action; used for access control. *See also* member.

additional information field (AIF) An additional field on an order line item.

Admin interface *See* graphical Admin interface

administrator A user who is authorized to administer the system. *See also* orgadmin, selfadmin, superadmin.

advance shipping notice (ASN) Electronic notification sent to a buyer organization that confirms shipment of an order.

API *See* Application Program Interface (API).

Application Program Interface (API) A set of routines, protocols, and tools for building software applications.

application server *See* iPlanet Application Server).

approval process The BuyerXpert process of passing a requisition through a series of approval steps until it is approved and becomes a purchase order or is cancelled. *See also* requisition process.

approver BuyerXpert user who authorizes an existing requisition to become a purchase order. An approver can be one of a group of approvers, can be a mandatory or optional approver, and can delegate approval authority to another. *See also* approver pool.

approver pool A group of approvers. *See also* approver, user group.

approver matrix A feature that allows the BuyerXpert administrator to set up approvers based on accounting codes and commodity codes.

attributes Characteristics that define classes and subclasses for items in a catalog. For example, attributes for an envelope could include size, paper weight, and color. *See also* catalog schema.

authentication The process of verifying the identify of a particular actor (user or process). That is, determining who that particular actor is.

authorization The process of verifying the actions allowed for a particular actor (user or process). That is, determining what that particular actor is allowed to do.

B2B Business-to-Business (B2B) shopper. An organization that is permitting authorized members of the organization to shop in its name

B2C Business-to-Consumer (B2C) shopper. An individual customer who has registered in the selling environment.

business rule A configurable, generalized statement that allows administrators to control the flow and behavior of BuyerXpert or SellerXpert.

buyer A user who is a procurement professional.

buyer catalog A view of a master catalog that selectively shows categories and items in the master catalog.

capture The process of collecting transactions that are ready for settlement. These captured transactions are submitted to a credit card processor for payment.

catalog A collection of products that can be ordered electronically from a database repository. The administrator sets up catalogs on an organization level, after which users are assigned access. *See also* product, SKU.

catalog manager import utility A utility for importing bulk catalog data offline using batch processing.

catalog ontology A catalog structure made up of product categories that contain product attributes associated with the categories.

catalog roles A set of privileges that allow a user to perform certain actions, such as superadmin, orgadmin, user, seller.

catalog schema A hierarchical data structure that defines classes and subclasses for products in a catalog. In the graphical interface, these classes appear as product categories. Parameters and attributes further define catalog items.

category A node in the catalog master ontology. A category contains attributes that are associated with the category. *See also* attributes.

charge A modification to the default pricing on a price list; usually accompanied by a cost-reducing condition such as prompt payment. *See also* DCAP.

commodity code A multi-segment BuyerXpert number that identifies a particular set of products or services.

contract tracking A BuyerXpert feature that provides the ability to associate a line item on a requisition with any contracts indicated by the contract identifier code(s) for that item.

conversion table A table that is used to convert measurable units within a class. *See also* unit of currency, unit of measure.

currency conversion value *See* unit of currency.

customer ID A unique identification number for a customer organization.

Data Universal Numbering System (DUNS) A unique nine-character organization identification number assigned by Dun and Bradstreet.

DCAP *See* discounts, charges, allowances, promotions.

Directory Server *See* iPlanet Directory Server, LDAP.

discounts, charges, allowances, promotions (DCAP) The various modifications that the administrator can make to the pricing contained in a price list.

discount A modification to the default pricing of an item that reduces the default selling price of an item by a specified sum or percentage, usually accompanied by a cost-reducing condition such as prompt payment. *See also* discounts, charges, allowances, promotions (DCAP).

DUNS *See* Data Universal Numbering System (DUNS).

ECXpert An iPlanet software product that transmits business documents and messages between buyer organization and seller organization servers.

EDI *See* Electronic Data Interchange (EDI).

Electronic Data Interchange (EDI) A paperless trade exchange system that replaces common business forms such as purchase orders, shipping forms, invoices, and so on, with a computer-based communications and record keeping system.

email shopping cart A SellerXpert feature that allows a buyer to send the details about an item she is considering ordering to a specified email address.

extensible markup language (XML) An extensible markup language, consisting of text interspersed with a few formatting tags, used to create documents on the World Wide Web. *See also* HyperText Markup Language (HTML).

freight charges The actual charges for a shipment.

Freight on Board (FOB) Specifies the location where title to the goods passes from the seller to the buyer. For example, upon leaving the warehouse, or upon arrival at the destination. For FOB terms, the seller pays the freight charges to the specified location and the buyer pays any charges beyond the FOB location.

freight terms An agreement between buyer and seller companies on how an order should be taxed and how the carrier is to be paid. Freight terms can be applied to an entire order or to a group of lines that have the same freight terms. *See also* shipping terms.

FOB *See* Freight on Board (FOB).

gatecheck The final approval process for BuyerXpert. Verifies that the specified approval requirements have been met.

graphical interface A point-and-click method for using a software product.

graphical Admin interface A graphical interface that allows the administrator to perform administrative tasks. Also called the Admin interface.

graphical User interface A graphical interface that allows the user to perform authorized user tasks. Also called the User interface.

group *See* user group.

guest login A SellerXpert feature that allows guest users to enter the webstore and perform many operations, such as browsing the catalog, adding items to the shopping cart, and checking for prices.

HyperText Markup Language (HTML) A markup language, consisting of text interspersed with a few basic formatting tags, used to create documents on the World Wide Web. *See also* extensible markup language (XML).

Import utility Utility used for importing data to the product database using a batch process. The Import utility provides both a graphical interface and a command-line interface.

import data file The format used by the Import utility to load data changes into the product database. Each import data file consists of comment lines, command lines, attribute lines, and body lines that specify the data to be changed.

inventory Quantity on hand for an item in a catalog. *See also* product, SKU.

invoice matching A BuyerXpert payment strategy whereby the recipient pays for received goods under certain conditions. Payment is authorized only if the prices and goods of the purchase order, the invoice, and the products received match.

iPlanet Application Server iPlanet server product that processes transactions and is the primary engine of BuyerXpert/SellerXpert.

iPlanet Directory Server The iPlanet implementation of LDAP. *See* LDAP.

iPlanet Portal Server An iPlanet product that allows a single sign-on for BuyerXpert, as well as a customized portal interface.

iPlanet Process Manager An iPlanet product that automates the flow of control for business processes.

LDAP See Lightweight Directory Access Protocol.

Lightweight Directory Access Protocol (LDAP) A network protocol that extracts information from a hierarchical directory, such as a user name, email address, security certificate, and other contact information. An LDAP repository has its own authentication and access control functions.

locale A particular country or region that uses different settings for language, number and date formats, graphics, and page layout (such as left to right or right to left).

localization The process of modifying a product for a specific international market, which includes translating the graphical interface, resizing dialog boxes, customizing features (if necessary), and testing results to ensure that the product works properly in the new locale. See locale.

master catalog The total of all seller catalogs.

master ontology See catalog ontology.

measurement conversion value See unit of measure.

member A user or process that has permission to access particular functions, resources, and data.

migration Method for migrating data from a previous implementation of the product. See Upgrade utility.

multi-currency A feature that allows for multiple currencies within one system or within one order.

multi-divisional organization An organization that uses admin and end-user privileges and business rules based on organizational units and groups.

multi-locale A feature that allows for multiple locales to be in use within one implementation of the product. Multi-locale can apply to date value (for example, product description) as well as to text messages. See also locale.

multi-org A feature that allows for multiple organizations within one instance of the product.

net price Price of a purchase order after discounts and charges have been applied. See also DCAP.

off-catalog item An item on a requisition that is manually described because the particular item is not available from an existing BuyerXpert catalog (the specific SKU code or seller may not be listed). Off-catalog items are processed by a procurement professional before the requisition they are associated with can be approved.

ontology See catalog ontology.

Open Buying on the Internet (OBI) Open standards for business-to-business Internet procurement.

order process The process of passing an order through a series of steps, ending in a payment.

order template A special type of order that can be used to create another order. A order template can contain actual items that are repeatedly ordered, or other types of information such as default billing and shipping.

organization A business entity that contains one or more organizational units. See *also* organizational unit.

orgadmin An administrator who can update information for his/her organization. An orgadmin cannot update information in sub-organizations. See *also* role.

organizational unit A partition of an organization that enables the SellerXpert administrator to set member privileges and approval parameters based on organization structure and rules. See *also* member.

parametric search Electronic search for items matching specific search parameters.

payment method The method that a customer uses to pay for an order. Payment methods can apply to an organization, an individual, or a group.

payment terms An agreement between buyer and seller organizations on how the buyer will pay the seller for purchases.

permissions An electronic mechanism for controlling access to resources by screening attempted access against preset parameters.

Portal Server See iPlanet Portal Server.

pricing adjustment A change to the price of a particular product after the customer selects the item. *See also* DCAP, net price.

primary account number (PAN) A unique number identifying a customer for a payment system. This number is encrypted for security and is only visible to the customer and the acquiring bank.

Process Manager *See* iPlanet Process Manager.

product A category for an item contained in a catalog. A product is part of the inventory, or stock, of a seller organization. *See also* SKU.

purchase order (P.O.) A BuyerXpert requisition that has been approved. Also known as an order.

purchase order template *See* order template.

purchase requisition (P.R.) *See* requisition.

receiving The BuyerXpert process of receiving items ordered from a seller. Allows for full or partial receiving amounts, as well as under-or over-receiving amounts.

reorder requisition *See* order template.

repeat order *See* order template.

requisition An electronic list of items that the buyer has requested. A BuyerXpert requisition that has not yet been approved as a purchase order. Also known as a purchase requisition (PR).

requisition process The BuyerXpert process of creating a requisition, either directly through the user interface, or indirectly through ECXpert. After a requisition is created, it passes to the approval process. *See also* approval process, order process.

requisition template A special type of BuyerXpert requisition that can be used to create another requisition. A requisition template can contain actual items that are repeatedly ordered, or other types of information such as default billing, shipping, and approval information.

requisitioner A BuyerXpert user who has privileges to create and submit requisitions.

role A set of privileges that allow a user to perform certain actions.

rule *See* business rule.

sales quote A SellerXpert feature that allows a snapshot of a shopping cart to be saved for a specific number of days as determined by the business rules. This quote is a legally binding price quotation.

Secure Sockets Layer (SSL) A protocol developed by Netscape that uses encryption to transmit secure documents on the internet. Web pages using an SSL connection start with https instead of http.

security policy An organization-defined methodology for protecting data from access by unauthorized people or processes, which include logging and tracking system events.

selfadmin A user who can update his/her own information. *See* role.

seller An organization that owns and sells products through a catalog. Also known as merchant, supplier, vendor.

shipping method A specification on how merchandise is shipped from a seller organization to a buyer organization. For example, Federal Express Overnight or UPS Next Day.

shipping terms An agreement between buyer and seller companies on how an order should in to be shipped. *See also* freight terms.

SKU *See* stock keeping unit (SKU) code.

SSL *See* Secure Sockets Layer (SSL).

stock keeping unit (SKU) code A unique alphanumeric code that subdivides a product into more specific categories. For example, a pen product can be subdivided by color, each color having its own SKU code. A catalog item cannot be sold without an SKU code. *See also* catalog, product.

storefront A set of integrated, packaged applications that are used to manage online selling of products, services, and content assets.

superadmin An administrator who can update information across all organizations. *See also* role.

supplier *See seller.*

supplier performance A BuyerXpert feature that provides the ability to track and compare sellers based on criteria such as quality of goods, quality of service, and timeliness of delivery.

TAXWARE A third-party software product used for calculating taxes.

timecard process A BuyerXpert process that provides a means for a timecard user (normally a contractor who works for the buyer organization) to electronically submit timecard information for payment approval.

unit of currency Indicates the currency conversion (such as USD to Euro, franc to lira, and so forth) to use for calculating the price of a product. Only one currency conversion unit can be specified for an order.

unit of measure Indicates the measurement conversion (such as centimeter to inch, liter to quart, kilogram to pound, and so on) to use for a items in an order.

Upgrade utility A utility for migrating legacy data from a previous version of the product.

user interface *See graphical User interface.*

user group A collection of users within a given organizational unit. In some ways, user groups resemble organization units, but organizational units have stricter polices regarding user membership.

users People who have access to the product. In general, BuyerXpert/SellerXpert users have privileges to create and submit orders; some users also have administrative privileges. Also known as people. *See also* members.

vendor *See seller.*

XML *See* extensible markup language (XML).

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