Release Notes for iPlanet™ BuyerXpert

Version *4.5*

Last Updated on 06/17/02

These release notes contain important information available at the time of the version 4.5 release of the iPlanet BuyerXpert software. New features and enhancements, installation notes, known problems, and other late-breaking issues are addressed here. Read this document before you begin using iPlanet BuyerXpert.

An electronic version of these release notes can be found at the iPlanet documentation web site:

http://docs.iplanet.com/docs/manuals/.

Check the web site prior to installing and setting up your software, and periodically thereafter to view the most up-to-date release notes and manuals.

These release notes contain the following sections:

- What's New in iPlanet BuyerXpert, Version 4.5

- Documentation

- Software Requirements

- Installation Notes

- Limitations and Known Problems

- How to Report Problems

- For More Information

What's New in iPlanet BuyerXpert, Version 4.5

- Interoperability with iPlanet Market Maker

- Blanket Purchase Order

- Archive/Restore Requisitions Feature

- New Installer

- Thin Portal Channel

- Performance Improvements

- Workflow Modifications

- New Administration Tools

- Exporting Business Rules

- Configurable OMS (omsConfig.ntv)

- Rule Cache (omsRule.properties)

- Internationalization

Interoperability with iPlanet Market Maker

The 4.5 release of iPlanet BuyerXpert provides a new level of interoperability with iPlanet Market Maker. For this implementation, a single sign-on feature has been developed so that users do not have to log in and out of the individual applications to use the interoperable functions. The two applications share the Oracle and iPlanet Directory Server (LDAP) databases. Key features that impact iPlanet BuyerXpert functionality are:

- Direct access to Auction and RFx functionality

  New Auction and RFx buttons in the iPlanet BuyerXpert User interface take users to the appropriate iPlanet Market Maker screens for that functionality. iPlanet Market Maker requisitions generated from Auction and RFx modules are exported as XML documents to iPlanet BuyerXpert through iPlanet ECXpert. The incoming XML documents are processed as iPlanet BuyerXpert inbound requisitions and are handled the same way as requisitions created locally within iPlanet BuyerXpert.

- Single sign-on

  You can log into either iPlanet BuyerXpert or iPlanet Market Maker and be able to access the interoperable functions. Both user interfaces have been enhanced with buttons and links to facilitate transport between the two applications.

- Cohabitation of catalog and membership data

  Any membership/community or made in either iPlanet BuyerXpert or iPlanet Market Maker is reflected in the other application. The LDAP and Oracle repositories are shared, so there is no need to enter data twice.

More information on this interoperability can be found in the BuyerXpert 4.5 *Concepts Guide.*

Blanket Purchase Order

The blanket purchase order functionality allows you to issue a standing purchase order to a particular supplier, limited by either a dollar amount, a time period, or both. Blanket purchase orders are only created by users who have the appropriate permission (defined by a business rule). After it has been created, a blanket purchase order goes through an approval process which may or may not be the same as the standard requisition approval process for your company. After approval, the new blanket purchase order is sent to the supplier using iPlanet ECXpert, and is available for buyers to order against this until its limits expire.

- To create a new blanket purchase order—If you are authorized to create blanket purchase orders, the Blanket P.O. button appears at the top of your main iPlanet BuyerXpert screen. Click this button to go to a screen from which you can initiate a new blanket purchase order for a supplier and submit it for approval. You can track the status of approval by clicking Manage Blanket Purchase Orders.

- To order against a blanket purchase order—After a blanket purchase order is approved, buyers can order against it by clicking the Buy button at the main iPlanet BuyerXpert screen, creating a new requisition, and selecting from the blanket purchase orders that are available for the particular supplier. Buyers can continue to order against a blanket purchase order until its limits are reached or until it has been deactivated by the owner.

- To track the status of a blanket purchase order—The status of a blanket purchase order can be monitored by the owner using the iPlanet BuyerXpert Track screen. The owner can view a summary of the requisitions against the particular blanket purchase order; the remaining balance is also displayed.

- Buyers cannot track a blanket purchase order, but any requisitions they have created against a blanket purchase order are identifiable individually through Track screens.

- When the blanket purchase order is near expiration or reaches the amount left, a notification is sent to the owner.

Instructions for creating and managing a blanket purchase order, for creating requisitions against a blanket purchase order, and for tracking expiration status are contained in the iPlanet BuyerXpert online Help.

Blanket Purchase Order Rules

New rules allow you to tailor the blanket purchase order functionality:

- Can Create Blanket Requisition rule—Gives permission to create blanket purchase requisition.

- BPO Limit Notification rule—Defines the notification process when a blanket purchase order is within a certain number of dollars/days of reaching its limit(s).

Information on the approval process and the iPlanet BuyerXpert business rules can be found in the iPlanet BuyerXpert *Administrator's Guide* and the Admin interface online Help.

Blanket Purchase Order APIs

A number of new APIs are available for the blanket purchase order function:

- isBPO—Determines whether the requisition is a blanket purchase order.

- isRBPO - Determines whether the requisition is a release against a blanket purchase order.

- getAmount—Gets the total amount for the blanket purchase order.

- getAmountLeft—Gets the total amount remaining for the blanket purchase order.

- getBPOId—Gets the blanket purchase order ID.

- getId—Gets the order ID.

- getDaysLeft—Gets the number of days left before this blanket purchase order becomes invalid.

- getSellerName—Gets the seller name for this blanket purchase order.

- getValidFromDate—Gets the valid start date for this blanket purchase order.

- getValidToDate—Gets the valid end date for this blanket purchase order.

- isActive—Determines whether the order against a blanket purchase order is active.

- updateAmount—Updates the amount of the requisition against a blanket purchase order.

Archive/Restore Requisitions Feature

To reduce the impact of large volume of data in the iPlanet BuyerXpert database, the archive/restore feature has been developed to allow you to move your old requisition records to a separate archival database. Once moved, the requisitions are no longer accessible online, but can be restored to the main database if needed. Report creation for requisition history does not include the archived requisition.

In the iPlanet BuyerXpert Admin interface, the Archive/Restore screen allows the administrator to select requisitions by specifying a date, a requisition number, or a range for either dates or requisition numbers. Each requisition is archived/restored in a transaction so the data integrity of the requisition is not compromised. The details of an archive/restore operation are logged to a text report.

In the iPlanet BuyerXpert User interface, summary information for archived requisitions is displayed in the Track screen of the person who created the requisition.

Instructions for using the archive/restore feature are contained in the online help for the iPlanet BuyerXpert Admin interface.

New Installer

An Installer utility is now available to ease the process of installing the iPlanet BuyerXpert software.

NOTE	If you are configuring for interoperability of iPlanet BuyerXpert and iPlanet Market Maker, you must install iPlanet BuyerXpert software before installing iPlanet Market Maker software. Interoperability options are built into the iPlanet Market Maker Installer. If iPlanet BuyerXpert is not already installed when you reach these queries, the iPlanet Market Maker installation cannot proceed.

Installer features:

- The Installer comes with a graphical interface, and can also be run from the command line.

- A single script is invoked to install iPlanet BuyerXpert.

- The Installer uses Setup SDK 5.0.2.

- iPlanet BuyerXpert is installed into a single directory schema; same root directory, similar sub-directory structure.

- The Installer is certified on the Solaris operating systems.

Full instructions for using the new iPlanet BuyerXpert Installer are contained in the iPlanet BuyerXpert 4.5 *Installation Guide*.

Thin Portal Channel

Along with thick portal channel capability, you can now configure thin channels for your portal. Instructions for thin channel configuration are contained in the iPlanet BuyerXpert *Installation Guide*.

Performance Improvements

- Turning Off Unused Functionality

- Lengthening the Rule Refresh Interval

Turning Off Unused Functionality

You are now able to turn on/off certain iPlanet BuyerXpert functionality in order to improve performance. In the `$IASROOT/buyer/buyer/config/oms/omsConfig.ntv` file, the following attributes can be modified:

- ❍ EVAL_MODEL
- ❍ DCAP
- ❍ SHIPPING
- ❍ TAX

Example

If you use the PriceList model without DCAP, SHIPPING, or TAX, you can set the parameters in the NTV file to turn off these three functions as follows:

```
NTV-ASCII {
"OMSConfig" NTV {
                "EVAL_MODEL"     Bool     "true",
                "DCAP"           Bool     "false",
                "SHIPPING"       Bool     "false",
                "TAX"            Bool     "false",
                },
}
```

To further improve performance, you may want to modify the CACHE_RULES properties in the `$IASROOT/ias/APPS/omsRule.properties` file at the same time. For the preceding example, you can exclude those rules related to DCAP, SHIPPING, and TAX in the CACHE_RULES properties file. (Refer to the comments in the `omsRule.properties` files to determine which rules are associated to EVAL_MODEL, DCAP, and so on.)

Lengthening the Rule Refresh Interval

Another change that could improve performance of the order management system (OMS) is resetting the RULE_REFRESH_INTERVAL in the omsRule.properties file. This is the time interval for refreshing the rules from the database. For instance, if RULE_REFRESH_INTERVAL = 20, when you modify a rule in the iPlanet BuyerXpert Admin interface, the change is reflected in iPlanet BuyerXpert within 20 minutes. The longer this time is, the less impact on the database, and thus, improved performance. The trade-off to making this interval longer is that it takes longer to see a change reflected in the Admin interface.

Workflow Modifications

- Improved Approval Inbox performance

- Improved Approver Matrix performance to meet large volume of customer data

- Escalation daemon performance improvement

- `EmailMgr` is changed to `EscalateToMgr` so that if there is no manager for an individual, any pending approval goes to someone defined by the `finalApprover` under the section `WFEscalationModel` in the `mail.ntv` file.

    It is recommended that the organization define a separate and unique UserGroup that includes one or two members designated as the `finalApprover`. If the `finalApprover` is an individual, make sure that the individual does not appear as a normal approver for any approval.

- Email Notification

    ❍ Complete informative email notification template with approver details, line / req level notes and attachments.

    ❍ Customizable headers.

    ❍ Declining a req generates an email notification to all the members informing the action

New Administration Tools

- Associated rules search—In the iPlanet BuyerXpert Admin interface, several links have been added to allow the administrator to display rules associated with particular resources (objects). When the Associated Rules link is clicked, the screen displays all the rules associated with the parent resource for that screen. For example, if you click the Associated Rules link on the `buyercompany` page, all rules associated with the company `buyercompany` are displayed.

- Membership rules disabling capability—When a membership resource, such as a specific location, is deleted, all rules containing reference to that location are automatically disabled. At the organization level, a new display allows the iPlanet BuyerXpert administrator to view and manage disabled rules.

- Chooser filter—An improved filtering mechanism limits the search engine efforts to a smaller set of data by presenting only relevant options using a chooser. Specific choosers:

    ❍ Receive screen—When a buyer tries to receive against an order for another user, a chooser that lists only eligible users is offered.

    ❍ Buy>Requisition Details>General screen—When a buyer assigns another user to function On Behalf Of self, a chooser that lists only eligible users is offered.

    ❍ All Location choosers—For all locations in the system, choosers offer only eligible locations.

Exporting Business Rules

- Import/Export utility —The Import/Export utility has been enhanced to now include exporting business rules.

- BuyerXpert ASBORules—BuyerXpert ASBORules can be exported based on various criteria. The export operation can be performed using BXImport with a READ option. The result of the export operation is an import file.

  For information on using the Import/Export utility for exporting business rules, see the Exporting Business Rules section in Chapter 7 (Importing/Exporting Data) of the iPlanet BuyerXpert 4.5 Administrator's Guide.

Configurable OMS (omsConfig.ntv)

In BuyerXpert 4.5, certain functionality can be turned ON/OFF to improve performance. In the `$IASROOT/buyer/buyer/config/oms/omsConfig.ntv` file, the following attributes can be modified:

```
EVAL_MODEL

DCAP

SHIPPING

TAX
```

For example:

If you use the PriceList model without DCAP, SHIPPING, or TAX, you can set the parameters in the NTV file to turn off these three functions as follows:

```
NTV-ASCII {

"OMSConfig" NTV {

"EVAL_MODEL" Bool "true",

"DCAP" Bool "false",

"SHIPPING" Bool "false",

"TAX" Bool "false",

},

}
```

When you disable a functionality, remove the corresponding rules from the Rule Cache (`omsRule.properties file`).

For the preceding example, you can exclude those rules related to DCAP, SHIPPING, and TAX in the CACHE_RULES property file.

Rule Cache (omsRule.properties)

In BuyerXpert 4.5, performance of the order management system (OMS) can be improved by resetting the `RULE_REFRESH_INTERVAL` in the `omsRule.properties` file. This is the time interval for refreshing the rules from the database. For instance, if `RULE_REFRESH_INTERVAL = 20`, when you modify a rule in the iPlanet BuyerXpert Admin interface, the change is reflected in iPlanet BuyerXpert within 20 minutes.

The `CACHE_RULES` property in the `$IASROOT/ias/APPS/omsRule.properties` file lists the list of rules that are cached.

Internationalization

iPlanet BuyerXpert is now multi-byte compliant, providing full support for Asian languages

Documentation

The following additions and updates have been made to the iPlanet BuyerXpert documentation for the 4.5 release:

*   BuyerXpert *Installation Guide*—new installer; bug fixes

*   BuyerXpert *Concepts*—new interoperability material; descriptions of new features.

*   BuyerXpert *Administrator's Guide*—setting up and using new functionality

*   BuyerXpert Admin interface Help—text on rules search, purchase order archiving

*   BuyerXpert User interface Help—material on blanket purchase order, archive tracking

The BuyerXpert documentation can be found at the following location:

> http://docs.iplanet.com/docs/manuals/buyer.html

Manuals, release notes, and FAQs for other iPlanet products can be found at the following location:

http://docs.iplanet.com/docs/manuals/

Software Requirements

The following software supports the BuyerXpert 4.5 product:

Table 1   Software Requirements for iPlanet BuyerXpert 4.5

Component	Supporting Software	Comments
Platforms	Sun Solaris (SPARC) 2.6	Patch 23 and higher
	Sun Solaris (SPARC) 8	Patch 5 and higher
Browsers	Netscape Communicator, Version 4.79, 6.2	Platforms: Solaris 2.6, 8, Windows 98, 2000, NT
	Microsoft Internet Explorer, Version 5.0, 6.0	Platforms: Windows 98, 2000, NT
iPlanet Infrastructure Products	iPlanet WebServer (iWS), Version 4.1 SP9, 6.0.1	Platforms: Solaris 2.6, 8; iWS 6.0.1; Bundled with iAS EE/EPE
	iPlanet Application Server (iAS), Version 6.5	Platforms: Solaris 2.6, 8; 6.5 EPE
	iPlanet Process Manager, Version 6.5	Platforms: Solaris 2.6, 8; Bundled with iAS EPE.
	iPlanet Directory Server, Version 4.13, 5.0 SP1	Platforms: Solaris 2.6, 8; Bundled with iAS EE/EPE
	iPlanet ECXpert 3.6.1	
Third Party Products	Oracle Server Database 8.1.7 / 9i Standard or Enterprise Edition, with interMedia search engine	Platforms: Solaris 2.6, 8; Customer must get Oracle license.
	Oracle Client 8.1.7 / 9i (if BuyerXpert is not installed on the same machine)	Customer must get Oracle license.
	Actuate Report Server, Version 5.0	Solaris server; Bundled. NT workbench for customizing reports

Patches

Patches may be required for some of the supporting software. Before installation, it is important to check the release notes for the supporting software to see if patches are required and how to get them. Documentation for iPlanet products can be found at the following web site:

> http://docs.iplanet.com/docs/manuals/

Installation Notes

- Procedure for Installing iPlanet BuyerXpert 4.5

- Procedure for Uninstalling iPlanet BuyerXpert 4.5

- Known Installation Issues

Procedure for Installing iPlanet BuyerXpert 4.5

Please refer to the iPlanet BuyerXpert 4.5 Installation Guide.

Procedure for Uninstalling iPlanet BuyerXpert 4.5

Please refer to the iPlanet BuyerXpert 4.5 Installation Guide.

Known Installation Issues

- During installation, the progress bar moves all the way to the end. This is a known issue in `setupsdk5.x`.

- During installation, there is no status on the panel.

  You can check the status in:

  `/tmp/BX45install-<user_name>` (for example, `tail -f /tmp/BX45install-janeyng/BX40install.log`)

Limitations and Known Problems

The following sections address any limitations and known problems that are associated with iPlanet BuyerXpert 4.5:

• Limitations and Issues

• Known Problems

Limitations and Issues

This sections describes limitations or issues that you need to know about to install, configure, or operate the iPlanet BuyerXpert 4.5 software.

• Display Issues

• Browser Issues

• Interoperability/Cohabitation Issues

• Internationalization/Localization Issues

• Transport/Mapping Issues

Display Issues

Some modifications aren't reflected immediately in the BuyerXpert screens.

To minimize caching problems, BuyerXpert is designed so that some asynchronous events are not reflected immediately for the end-user. For example:

❍ When the administrator changes settings, such as a default shipping address

❍ When an approver approves a requisition or adds a note

Solution

To have the changes reflected in the User interface, users must log out and log in again.

Browser Issues

Netscape 6.2 occasionally experiences some rendering issues.

• Many JSPs do not render fully.

Solution

Reload the page and proper rendering occurs.

Some pages produce a warning that The page you are trying to view contains POSTDATA that has expired from cache...

Solution

Click the OK button to resend the data.

Interoperability/Cohabitation Issues

When you create a new organization in iPlanet BuyerXpert, and yet do not create a user for this organization, the company appears as Active in iPlanet Market Maker.

In iPlanet Market Maker, a company cannot be Active unless there is a user.

Workaround

Create a user in BuyerXpert.

Disable CatalogManager in Cohabitation Mode

`CatalogManager` needs to be disabled when iPlanet BuyerXpert is used in cohabitation with iPlanet Market Maker to avoid the possibility of data corruption.

Reading from the open `DisplayConfiguration.properties` file, the attribute that is being read is `CFG_BX_IMM_INTEROP`.

❍ If this is `true`, then the iPlanet BuyerXpert Catalog Manager is disabled.

❍ If it is `false`, then it is enabled.

Restart KIVA after changing the attribute value.

Internationalization/Localization Issues

Setting required for UTF8.

If the database is configured for a UTF8 character set, the NLS_LANG environment variable should be set to American_America.UTF8. This setting is required for importing data into a UTF8 database.

Instructions for Setting up the Chinese Version of iPlanet BuyerXpert4.5

1. Install the Chinese version of iPlanet BuyerXpert.

2. Apply the `jasper.jar` to iAS.

3. Copy the attached `jasper.jar` to your '*<IASROOT>*`/ias/classes/java/tomcat` directory.

4. Make the iAS registry entries:

   a. Run `kregedit` (from `$IAS_ROOT/ias/bin/kregedit`)

   b. Select the key `NLS` under Application server/6.5.

   c. Go to edit->`Add` key.

   d. Enter the value `App NLS Setup`.

   e. Select the key `App NLS Setup`.

   f. Go to edit -> `Add` key.

   g. Enter the value `buyer`.

   h. Select the key `buyer`.

   i. Go to edit -> `Add` value.

   j. Enter the following values:

   ❍ Name: `DefaultLocale`

   ❍ Value: `en_US`

   ❍ Select `String` as type

5. Select the key `buyer`.

6. Go to edit -> `Add` key.

7. Enter the value `Supported Locales`.

8. Select the key `Supported Locales`.

9. Go to edit -> `Add` value.

10. Enter the following values:

    ❍ Name: `en_US`

    ❍ Value: `UTF8`

    ❍ Select `String` as type

11. Select the key `App NLS Setup`.

12. Go to edit -> `Add` key.

13. Enter the value `buyer_admin`.

14. Select the key `buyer_admin`.

15. Go to edit `->` `Add` value.

16. Enter the following values:

- ❍ Name: `DefaultLocale`
- ❍ Value: `en_US`
- ❍ Select `String` as type

17. Select the key `buyer_admin`.

Go to edit `->` `Add` key.

18. Enter the value `Supported Locales`.

19. Select the key `Supported Locales`.

20. Go to edit `->` `Add` value.

21. Enter the following values:

- ❍ Name: `en_US`
- ❍ Value: `UTF8`
- ❍ Select `String` as type

22. Make locale entries for iAS environment.

23. Add the following entries to <*IASROOT*>`/ias/env/iasenv.ks`.

```
export LANG=en_US.UTF-8

export LC_ALL=en_US.UTF-8
```

24. In file <*IASROOT*>`/ias/bin/kjs`, remove the following entry if it is present. (Last line of `kjs` script).

```
-DPREPENDNASAPP=false
```

25. Make sure that you have the following entry in the file <*IASROOT*>`/ias/env/iasenv.ksh`:

```
export LANG=en_US.UTF-8

export LC_ALL=en_US.UTF-8
```

Restart KIVA.

Transport/Mapping Issues

Document mapping limitations between EDI and XML.

There are some mapping issues between EDI and XML that result from the iPlanet BuyerXpert design for inbound and outbound documents. The affected element is FirstName.

❍ Inbound (mapping from EDI to XML)—For the SellingParty, BillToParty, and ShipToParty contact, the full name is mapped into the FirstName field. That is, you do not need to map the first name and last name into separate fields. For the BuyingParty contact, email uses the buyer's login name, which automatically retrieves the user name.

❍ Outbound (mapping from XML to EDI)—For all (BuyingParty, RequisitionParty contact, SellingParty, ShipToParty, and BillToParty contact) the FirstName field contains the first name and the LastName field contains the last name. Please map accordingly.

Known Problems

This section describes the product bugs that may affect your experience installing or using iPlanet BuyerXpert 4.5. Bugs are listed in numeric order.

• 4527777 Cancel order does not work properly.

• 4536077 Data integrity issues in rules.

• 4537302 Orgadmin cannot maintain catalogs.

• 4537825 Referential integrity problems occur between catalog and membership.

• 4537875 Some OMS Blanket Purchase Order import formats do not use object reference when referencing the owner/s.

• 4540235 Order:CalcTaxFailed error occurs.

• 4540307 RuleEngine: rule value is stored as one DB column.

• 4541520 Need a longer escalation daemon interval.

• 4550344 BuyerXpert ignores the Disabled status of a Ship-To location.

• 4550532 Ship-To location doesn't allow search by city and state.

• 4615883 Cannot import or export more than one rule for the same user.

• 4619113 An exception is thrown when using Java version 1.3.1 to load sample catalog data.

• 4622042 Shipping request date sent to vendors is off by a day.

• 4630249 Incorrect Organization Search Result

- 4630322 Users must login again when going from iPlanet Market Maker to iPlanet BuyerXpert

- 4662040 Clicking on People of an organization leads to page time out errors.

- 4662071 User is logged out under the imm.jsp when clicking on Browse Catalogs.

- 4665989 Problem with sequences, PO numbering.

- 4666145 Could not install iPlanet BuyerXpert on Chinese UTF-8 locale.

- 4666411 Cannot create a username that begins with the less-than symbol (<).

- 4668413 Notes button brings user to a wrong page.

- 4668546 Active Blanket Purchase Orders List is not updated instantly.

- 4671141 No authenticated session on buyer-admin login page with Netscape / IE browsers.

- 4671339 Select Company feature in Catalog Manager not working.

- 4671992 Time part of validity (Valid From/Valid To) information is not carrying along with Release BPO.

- 4672068 BPO amount remaining is not instantly updated in Active Blanket Purchase Orders list.

- 4672171 Cohab: CompanyAdmin created in iPlanet Market Maker is perceived as a Self Administrator in BuyerXpert

- 4673506 Not able to generate a BuyerXpert report using IE5.0.

- 4673545 Some mandatory iPlanet Market Maker attributes for an organization are not populated when a new organization is created in BuyerXpert.

- 4673693 The approver graph shows an exception.

- 4675243 BPO Approval Process Default Rule link is missing.

- 4678254 In a webless case, installer cannot populate sample data.

- 4679797 No warning on Actuate Report screen when nothing is entered in fields.

- 4679912 Unable to list Invoice Matching Algorithm Rule under associative rule of an organization.

- 4680009 After a catalog item is added (in IE, but not in Netscape) the Additional info is taken for all further items, independent of whether it is off-catalog or on-catalog.

- 4682862 New LDAP sample data doesn't work in iDS4.13.

- 4686283 Buyer Admin Chinese online help cannot be launched from Chinese IE.

- 4688483 Can view a deleted role using iPlanet BuyerXpert in iPlanet Market Maker.

- 4688595 In BPO, the email does not have a request date.

- 4691412 LDAP and Oracle sample data cannot be fully populated during the installation.

- 4692301 Log in as Buyer. The Choose link does not work (Receive -> Advance -> Choose)

4527777 Cancel order does not work properly.

Workaround

In the outbound XML, when the company display name should appear instead of the company ID, replace `company_name` with `company_display_name` in either `outbound-extra.ntv` or `outbound.ntv`, depending on the rule value of Pre 4.1SP1 850 EDI Map. Make changes in:

❍ `outbound.ntv`, if the rule value is *true*

❍ `outbound-extra.ntv`, if the rule value is *false*

4536077 Data integrity issues in rules.

When deleting a catalog item, rules in which this item/category is a role are not disabled.

Workaround

None at this time.

4537302 Orgadmin cannot maintain catalogs.

As an orgadmin, you can't see the Edit Items tab for catalog; only the superadmin/systemadmin can maintain catalogs.

Workaround

The superadmin/systemadmin need to create a catalog superadmin/systemadmin group and add the orgadmin to that user group. After that, the orgadmin can maintain catalogs for his/her organization.

4537825 Referential integrity problems occur between catalog and membership.

Catalog items belong to seller (vendor) companies. When a multi-vendor catalog is loaded, the supplierID attribute determines the identity of the seller company for that item. The XML file contains an Organization Name field which is defined in iPlanet BuyerXpert import files as the supplierID. The load utility performs an LDAP lookup for this organization, obtains the organization GUID, and stores it in the catalog. This GUID is the connection between the membership data stored in LDAP and the item details stored in the catalog.

This tight integration presents problems when re-loading membership data after the catalog has been loaded.

Workaround

Use the insert_overwrite operation when updating the seller company information in LDAP instead of the delete operation followed by an add operation. For a seller company, the delete operation followed by the add operation may be considered *clean*—having no associated residue (locations, business rules, and so on) from a prior setup that may cause errors. Because the seller company has a new GUID, this is true. However, in reality, the delete and add operations simply deal with the LDAP data; a new GUID is assigned to the seller company, but all the old business rules and other entries remain in the database as orphan records.

4537875 Some OMS Blanket Purchase Order import formats do not use object reference when referencing the owner/s.

Import formats for `Adjustment`, `PriceList`, `Unit`, `UnitConvTable`, `FreightTerm` and `ShipMethod` have been changed.

Solution

Use organization references ([Organization name=`testOrg`]) instead of organization names (`testOrg`) for `owner_company` and `created_for`. For backward compatibility, organization names are also allowed. However, it is recommended that you use organization references.

4540235 Order:CalcTaxFailed error occurs.

Occasionally the Order:CalcTaxFailed error occurs when submitting or viewing a requisition. Usually this happens when there is no corresponding tax rule.

Workaround

Verify that there is a tax rule for adjustments that are taxable.

4540307 RuleEngine: rule value is stored as one DB column.

A user who creates a rule that returns a list of rules should always attach only eight or ten values to one instance of the rule. A user interested in creating a rule with more than ten values should create two or more instances of the same rule.

Example:

❍ A company has 25 locations, LOC1, LOC2, LOC3....LOC25.

❍ The user wants to create `SHIPTO_LOCATION_LIST` rule for `user1`.

Workaround

The user should create three rule instances for `user1` with up to ten locations each:

```
rule instance 1 - LOC1...LOC10

rule instance 2 - LOC11...LOC20

rule instance 3 - LOC20...LOC25
```

4541520 Need a longer escalation daemon interval.

In the `wflog.ntv` file, in `com/iplanet/buyer/admin config/workflow`, there are two entries: WfLogArchiveConf and WfEscalateConf. The first entry is not used. The WfEscalateConf entry can be edited to change the interval for the escalation daemon. Default value is:

```
"internal" Str "*5,10,15,20,25,30,35,40,45,50,55:0 */*/*",
```

The numbers represent the interval at which the daemon starts. The default value above starts the escalation daemon every five minutes.

Workaround

Edit the `WfEscalateConf` entry with another time interval. For example, the following setting starts the daemon once per hour:

```
"interval" Str "*5 */*/*",
```

After you have changed the setting, re-register the daemon in the iPlanet BuyerXpert Admin interface (Approvals>Register Daemon).

4550344 BuyerXpert ignores the Disabled status of a Ship-To location.

When a location is disabled, any associated location rules are not automatically disabled.

Workaround

Use the Admin interface to manually disable associated location rules.

4550532 Ship-To location doesn't allow search by city and state.

To search locations on city, state, and country code, a workaround is required.

Workaround

Perform these steps:

a. Add the following strings into the string array in NTVASCII.chooser LocationChooser.search.param.attributes, in the

   `$ias_root/buyer/buyer/config/oms/chooser.ntv` file:

   ❍ minor_locality

   ❍ major_locality

   ❍ country_code

b. Index the locations in the LDAP database on common_name, major_locality, minor_locality, and country_code.

4615883 Cannot import or export more than one rule for the same user.

As a result of the rule export, the `imp` file has `INSERT` as the import operation. The user might need to change it to the desired operation before importing this file.

Workaround

None at this time.

4619113 An exception is thrown when using Java version 1.3.1 to load sample catalog data.

Workaround

Change the 4 */*'s to 3 */*'s in the value for SYSTEM in the `mm.xml` and `mm.dtd` files.

Java1.3 is more specific about the syntax of XML `DOCTYPE`. It allows only 3 */*'s.

For example, if the XML file directory is `/home/iplanet/catalogs`, change the `mm.xml` content from:

```
< <!DOCTYPE vortex-data-load SYSTEM "file:////home/iplanet/catalogs/mm.dtd">
```

--- to

```
> <!DOCTYPE vortex-data-load SYSTEM "file:///home/iplanet/catalogs/mm.dtd">
```

and similarly for the `mm.dtd` file.

Note: This exception happens only when the user tries to load the sample catalogs that are part of the installed product.

However, for `xml/dtd` files generated by the `createxml.sh` / catalogtools utilities, this may not be the case. If this error occurs, check your `xml/dtd`, edit them if the number of */*'s are not 3 exactly after *file*.

4622042 Shipping request date sent to vendors is off by a day.

Solution

In iPlanet BuyerXpert 4.5, the value for a date-related element is appended by a timezone.

The customer can specify a timezone (such as GMT or PST) or `USER_PREFERRED_TIMEZONE` in `xdocinfo.ntv`.

If the `USER_PREFERRED_TIMEZONE` is specified, the `preferred_timezone` of the person who creates the requisition/timecard is used as the timezone for a PurchaseOrder, OrderChange and TimeCard. For an Invoice, the GMT is used, since there is no creator or owner concept for invoice.

4630249 Incorrect Organization Search Result

1. Log in to Buyer-Admin.

2. Type 'm' in the Organization field.

3. Click Search.

   A list appears including organization names that do not seem to include the letter 'm'.

   There are two attributes that are being searched:

   a. Name

   b. Display_name

      The Name attribute could have the letter that is entered in the Organization fields, while its Display_name does not.

Workaround

   None at this time.

4630322 Users must login again when going from iPlanet Market Maker to iPlanet BuyerXpert

   This problem only occurs when BuyerXpert and Market Maker have separate copies of the `crypto.key` file. The password encrypted by one application is not getting properly decrypted by the other application.

Workaround

   ❍ When the installations are on the same host, change the entry in the BuyerXpert copy of `VortexConfiguration.properties` to use the `crypto.key` file used by the Market Maker installation.

   ❍ When the installations are on different hosts, FTP the `crypto.key` file from the Market Maker machine to the BuyerXpert machine, and replace the BuyerXpert copy of the `crypto.key` file with the file used by the Market Maker installation.

4662040 Clicking on People of an organization leads to page time out errors.

Workaround

   You can use configVLVIndex.sh script if IDS and BX instance are on same machine.

   You need to restart the slapd instance after creating indexes.

   Otherwise follow the steps below to create `vlvindex` on IDS:

1. `vi iAS65/buyer/sample_data/directory_ldif/buyer/iplanet/customVLV.ldif.`

2. Replace `PARENT_ORG` with company id (BuyerCompany).

3. Replace `PARENT_ORG_DN` with the company dn on which you are creating `vlvindex`.

4. Replace `PARENT_ORG_GUID` with the company guid.

   For example, for a location in BuyerCompany, it is BuyerCompany `iplanetecguid`.

   And, for BuyerCompany, it is the `iplanetecguid` for `o=iplanet.com`.

5. Replace `ROOT_DN` with r`oot_dn`

   For example, `o=iplanet.com`.

6. Use the following command to load `vlvindex` data.

```
$IAS_INSTALL_DIR/shared/bin/ldapmodify -h $HOSTNAME -p $PORT -c -a -D $BIND_DN -w
$PASSWD -f customVLV.ldif
```

   or

```
$IAS_INSTALL_DIR/shared/bin/ldapmodify -h $HOSTNAME -p $PORT -c -a -D $BIND_DN -w
$PASSWD -f customVLV_5x.ldif
```

For IDS 4.1x

_____

1. Run `$IAS_INSTALL_DIR/$SLAPD_DIR/vlvindex`.

   This shows all of the indexes that you loaded through `customVLV.ldif`.

   `[12/May/2002:01:39:07 +0800] - ldbm2index: Unknown VLV Index named ''`

   `[12/May/2002:01:39:07 +0800] - ldbm2index: Known VLV Indexes are: 'BuyerCompany-locations',`

   `'BuyerCompany-orgs', 'BuyerCompany-orgunits', 'BuyerCompany-orgPersons', 'BuyerCompany-groups',`

2. Create `vlvindexes` individually.

   ❍ Run `/export/netscape/server4/slapd-ecom-50k/vlvindex BuyerCompany-locations`.

....

   ❍ Run `/export/netscape/server4/slapd-ecom-50k/vlvindex BuyerCompany-groups`.

3. Restart your LDAP instance.

For IDS 5.x

_____

1. Stop your current instance.

   `$SLAPD_DIR/stop-slapd`

2. Run `$IAS_INSTALL_DIR/$SLAPD_DIR/vlvindex`.

   This shows all of the indexes that you loaded through `customVLV_5x.ldif`.

   ```
   [12/May/2002:01:39:07 +0800] - ldbm2index: Unknown VLV Index named ''
   [12/May/2002:01:39:07 +0800] - ldbm2index: Known VLV Indexes are:
   'BuyerCompany-locations',
   'BuyerCompany-orgs', 'BuyerCompany-orgunits', 'BuyerCompany-orgPersons',
   'BuyerCompany-groups',
   ```

3. Create vlvindexes individually.

   ❍ Run `/export/netscape/server4/slapd-ecom-50k/vlvindex -n userRoot -T BuyerCompany-locations`

   ....

   ❍ Run `/export/netscape/server4/slapd-ecom-50k/vlvindex -n userRoot -T BuyerCompany-groups`

4. Start your LDAP instance.

   or

   ❍ Copy the `customVLV.ldif, customVLV_5x.ldif & configVLVindex.sh` to `$IAS_INSTALL_DIR/buyer/sample_data/directory_ldif/buyer/iplanet`

   ❍ Run configVLVIndex.sh

   For example, `./configVLVIndex.sh ecom-10.india.sun.com 18000 "o=iplanet.com"`

   ```
   "cn=Directory Manager" adminadmin "/export/netscape/server4/" "mercury.com"
   "/export/netscape/server4/slapd-klm"
   ```

Procedure for creating normal indexes:

BuyerXpert 4.5 needs indexes on the following attributes:

```
cn                      pres, eq, sub

displayname             pres, eq, sub

givenname               pres, eq, sub

iplanetecguid           pres, eq

iplanetecparentorgguid  pres, eq

o                       pres, eq, sub

ou                      pres, eq, sub

uid                     eq, sub
```

To make the index effective with every entry in IDS, you need to load complete data into IDS and then create indexes.

Using the Directory Server Console you can create presence, equality, approximate, substring, and international indexes for specific attributes

To create indexes:

1. On the Directory Server Console, select the Configuration tab.

2. Expand the Data node, and then expand the suffix of the database you want to index, and select the database.

3. Select the Indexes tab in the right pane.

4. If the attribute you want to index is listed in the Additional Indexes table, skip to Step 6. Otherwise, click Add Attribute.

   A dialog box appears containing a list of all of the available attributes in the server schema.

5. Select the attribute you want to index and click OK.

   The server adds the attribute to the Additional Indexes table.

6. Select the checkbox for each type of index you want to maintain for each attribute.

7. Click Save.

4662071 User is logged out under the imm.jsp when clicking on Browse Catalogs.

This issue prevents the user from using Catalog Manager.

Workaround

1. Start `./ksvradmin` from `$IAS_ROOT/ias/bin` ..

2. Click the application icon in the Administration Tool to view and configure the application settings.

3. Select the iPlanet Application Server instance.

4. Drill down to the System module under Default application.

   The servlets appear in the right pane.

5. Ensure that the Sticky Load Balance checkboxes for servlets `System_JSPRunner` and `System_JSPRunnerSticky` are checked.

6. Click Apply Changes.

7. Restart the web and application server.

4665285 Download/Print button does not work with a specific version of IE.

When using IE version 5.00.3315.1000, the Download/Print button does not work from the Option section at the bottom of a generated BuyerXpert report.

Workaround

Use a Netscape browser.

4665989 Problem with sequences, PO numbering.

Two Line grouping Number rules can have different sequences only if their prefix-length-suffix combination is different.

Workaround

None at this time.

4666145 Could not install iPlanet BuyerXpert on Chinese UTF-8 locale.

The installation fails when starting the GUI installer on the Chinese UTF-8 (`zh_CN.UTF-8`) locale. The license screen is blank, the installation directory field is empty, and all of the other input doesn't display. This is a known issue with `setupsdk` installer.

Workaround

Switch locale to C and install the product.

4666411 Cannot create a username that begins with the less-than symbol (<).

Searching for a user that begins with the less-than symbol (<) produces a result, but does not show the name and login, while a username with the less-than symbol (<) works.

Workaround

Although a username in BuyerXpert can have a less-than symbol, it cannot begin with a less-than symbol.

4668413 Notes button brings user to a wrong page.

Instead of clicking the Back button, the user must click *Cancel and return* with any chooser. Otherwise, clicking on any button takes the user to the chooser screen.

This problem only happens on Internet Explorer 5 (and higher) and Netscape 6.0 (and higher) browser

Workaround

None at this time.

4668546 Active Blanket Purchase Orders List is not updated instantly.

This happens when a BPO is created in one session and is trying to create an RBPO. The user is not able to see all active BPOs while choosing a BPO for creating a requisition on the BPO. The creator of the BPO waits for the approver to approve it, and then tries to use the BPO to raise an RBPO, all in one session. This is a problem because POF does not fetch the latest objects to the end user when the action happened elsewhere. This BPO is available instantly for everyone else who can use it, including the approver.

Workaround

None at this time.

4671141 No authenticated session on buyer-admin login page with Netscape / IE browsers.

In some cases you may be inadvertently logged out with a No Authenticated Login message when you try to login to admin.

Workaround

Restart your browser.

4671339 Select Company feature in Catalog Manager not working.

Using *All* while Creating a buyer Catalog:

If a user creates a buyer Catalog and does not select any company, by default *All* companies are added to the Seller Company List.

After creating the Buyer Catalog, if you deselect a Seller Company from the Buyer Catalog, the items of that company are not removed from that catalog.

Workaround

When creating a catalog, be sure to make selections from the list of companies.

For existing catalogs created prior to this release, using the Catalog Edit option, you might need to manually delete items for those companies that were removed from the list of Seller companies.

4671992 Time part of validity (Valid From/Valid To) information is not carrying along with Release BPO.

When creating a BPO with attributes Valid From and Valid To as the date and time, the BPO is being created with only the date, and the time is truncating.

1. If the user enters the date without the time (manually, or from Calendar) in the Valid From field, the default time is 00:00 hrs.

2. If the user enters the date without the time (manually, or from Calendar) in the Valid To field, the default time is 23:59 hrs.

3. The user can enter a specific time by:

   a. Selecting the time from Calendar.

   b. Overwriting the existing time (user entered via Calendar or by way of the system default) in the date field.

   No screen other than the Initiate BPO shows the time associated with the date.

Workaround

None at this time.

4672068 BPO amount remaining is not instantly updated in Active Blanket Purchase Orders list.

After an RBPO is approved, the amount under Active BPOs is not decreasing by the approved RBPO amount as it should.

Workaround

Logging out and logging in again causes the expected changes to appear.

4672171 Cohab: CompanyAdmin created in iPlanet Market Maker is perceived as a Self Administrator in BuyerXpert

Create a new company in iPlanet Market Maker in the cohab mode. The user created in this process is a companyAdmin. When logging in to iPlanet BuyerXpert as the company and the new user, the new user logs in as a Self Administrator.

The user role implementation in iPlanet BuyerXpert is different from iPlanet Market Maker.

BuyerXpert user roles are identified by an LDAP attribute (`iplanetbuyerrole`) with a value of selfadmin, orgadmin, or sysadmin.

The iPlanet Market Maker roles implementation is like the user group implementation, and is based on the policies entry in LDAP.

It is a considerably large task to change the role implementation and make it compatible with iPlanet Market Maker. As there is a heavy dependency of the `iplanetbuyerrole` in BuyerXpert, this attribute should be left untouched while creating a user.

Workaround

None at this time.

4673506 Not able to generate a BuyerXpert report using IE5.0.

With Internet Explorer 5.0, when trying to generate a report, the status bar at the bottom of the page appears to be loading, but instead, an error message displays.

4673545 Some mandatory iPlanet Market Maker attributes for an organization are not populated when a new organization is created in BuyerXpert.

When an organization wants to use the interoperability feature between iPlanet BuyerXpert and iPlanet Market Maker, the display alias, company contact, and address attributes that were created in iPlanet Market Maker do not show up in iPlanet BuyerXpert, making the RFx and Auction.modules inaccessible to the organization.

Workaround

After creating a new organization in iPlanet BuyerXpert, update the display alias, company contact, and address attributes.

4673693 The approver graph shows an exception.

After creating a BPO, an RBPO, and completing the approval cycle, when a user clicks Track to see the RBPO information, and then clicks Approve, an exception appears.

This occurs when the approver is also the member of the employee group.

Workaround

Logout after an approval, and login again to view the approver graph.

4675243 BPO Approval Process Default Rule link is missing.

Because the rule entity is missing, you cannot create a rule.

There is no separate workflow for BPO or release BPO. Requisition workflow definition itself handles requisition BPO and Release BPO.

Workaround

Conditional statements have been introduced in the process definition script --> If BPO, then follow these steps, and if RBPO, then follow these steps.

4678254 In a webless case, installer cannot populate sample data.

In webless case, installer doesn't have a way to get the web server URL. It always uses localhost as the default web server for sample data population.

Workaround

If you need to install sample data for a webless environment, you must use option 0 to install the BuyerXpert 4.5 software. After installing the software, you need to manually run the `create_schema` and `import_data` scripts to populate the sample data. At that time, you can specify your web server URL to load data.

4679797 No warning on Actuate Report screen when nothing is entered in fields.

You cannot move from one screen to another if required fields are not filled in, and no warnings appear.

Workaround

Be certain to fill in all fields in the installation screen with valid entries.

4679912 Unable to list Invoice Matching Algorithm Rule under associative rule of an organization.

When creating a new rule and giving an Invoice Matching Algorithm, the rule is not listed under the associated rules of that organization or under tech.

For a rule to come under the Associated Rules tab of an organization, the company owner ID should be the company whose associated rules you are viewing, and the organization should be one of its voters.

Workaround

The following rules now do not appear under associated Rules:

❍ Invoice Matching Algorithm all rules

❍ Quantity Conversion Table

❍ Quantity Precision Rules

❍ Weight Conversion Table Rules

❍ Weight Precision Rules

4680009 After a catalog item is added (in IE, but not in Netscape) the Additional info is taken for all further items, independent of whether it is off-catalog or on-catalog.

Line Additional Information should be asked for only in the case of an On-Catalog item.

Workaround

Ensure that the following setting exists in IE:

Tools--> Internet Options--> Under Temporary Internet Files --> Settings --> Every Visit to Page.

4682862 New LDAP sample data doesn't work in iDS4.13.

After installation, the user is not able to login to the end user side using the sample data entry, *kevin/kevin*.

In `sampledata`, there are two *kevin* entries:

```
dn: uid=kevin,ou=People,o=Mercury Enterprises, o=iplanet.com
```

```
dn: uid=kevin,ou=People, o=BuyerCompany,o=iplanet.com
```

This is not an issue - it is expected behavior: There can be two users with the same UID in different companies.

This does not occur with IDS 5.X. By default IDS 5.0 `uid uniqueness` is turned off.

Workaround

Using IDS 4.X:

1. `ids413/Startconsole`.

2. Create a new IDS instance.

3. Click servergroup.

4. Click your created instance.

5. Goto configuration==>plugin==>uid uniqueness.

6. Disable `uid uniqueness`.

7. Restart your SLAPD instance.

8. Install BX45 on 4.1X.

4686283 Buyer Admin Chinese online help cannot be launched from Chinese IE.

iPlanet BuyerXpert online help can be launched before login. After login, it cannot be launched.

Workaround

None at this time.

4688483 Can view a deleted role using iPlanet BuyerXpert in iPlanet Market Maker.

1. Login to BuyerXpert Admin.

2. Delete a usergroup.

3. Login to iPlanet Market Maker.

4. Go to Community -> Administer Company -> View Roles.

   You can view the deleted role.

   This is expected behavior.

Workaround

In cohab mode, use only BuyerXpert Admin to administer usergroups, and a BuyerXpert deleted role is still visible in iPlanet Market Maker.

4688595 In BPO, the email does not have a request date.

1. Setup email for BPO.

2. Create a BPO

3. Submit the BPO for approval.

   The request date does not appear for the email approver - the request date text appears as *N/A*.

Workaround

None at this time.

4691412 LDAP and Oracle sample data cannot be fully populated during the installation.

Workaround

Run the BuyerXpert installer under `C Locale`.

Ensure that the current locale is `C` before invoking the installer. If not, do the following before invoking the installer:

```
> setenv LANG C
```

```
> setenv LC_ALL C
```

4692301 Log in as Buyer. The Choose link does not work (Receive -> Advance -> Choose)

Workaround

None at this time.

How to Report Problems

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

- iPlanet online support web site at:

  `http://www.iplanet.com/support/support_services_10_0.html`

  From this location, the Online Support Center is 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

For More Information

Useful iPlanet information can be found at the following locations:

- iPlanet release notes and other documentation — `http://docs.iplanet.com/docs/manuals/`

- iPlanet product status — `http://www.iplanet.com/support/technical_resources/`

- iPlanet Professional Services information — `http://www.iplanet.com/services/professional_services_3_3.html`

- iPlanet developer information — `http://developer.iplanet.com/`

- iPlanet learning solutions — `http://www.iplanet.com/learning/index.html`

- iPlanet product data sheets — `http://www.iplanet.com/products/product_map/product_name_2_0a.html`

For More Information