



JD Edwards World

Self-Service Installation

and Configuration Guide

Version A9.1/A9.2

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Overview

Internet commerce, the exchange of goods and services on the Internet - specifically the World Wide Web (WWW), is becoming an essential medium for conducting business with other businesses and with consumers. Internet technology is inexpensive, increasingly secure, and built on standards that make communicating with suppliers and partners a simple task. Good relationships with suppliers are critical to any organization's efficiency. For an organization to maintain predictable delivery of goods and services, it has to know what it can deliver and when. Clear, concise, and accurate information is essential to an efficient relationship.

Businesses can use the JD Edwards World Self-Service application suite at any time for transactions such as entering time worked, making choices for employee benefits, and changing addresses.

Self-Service Technology

The Self-Service application suite was designed using the current SEAGULL J Walk technology and templates, which can be altered to fit individual needs. This Web (or server) technology provides you with a Web look while running JD Edwards World, but with greater functionality and ease of use.

With minimal setup on your part, the user can work from a remote site. For example, when using Employee Self-Service, the employee can make changes to their benefit selections and change addresses as well as enter their time worked through the Employee application system.

Self-service applications are designed to simplify the processes that users need to perform. For example, the user can bypass screens and go directly to the screen of choice. In addition, by using the features that are available within J Walk, users do not have to perform as many keystrokes and clicks. Therefore, this Web (or server) technology allows great functionality and ease of use. The applications are JD Edwards World products, and all screens have a Web look and feel. Examples of the information that the products contain are time entry, vacation and sick balances, benefit selections, changes of address, and dependent/beneficiary information.

All Self-Service applications use a navigation bar on the left side of each panel, which gives the user great flexibility for adding, changing, or inquiring about specific information. This Self-Service application provides standard images or buttons for Cancel, OK, and Enter. The buttons also enable the user to access additional information from any panel.

Any Self-Service application can be modified using the SEAGULL J Walk Developer Kit.

Advantages

Examples of the many advantages of the Self-Service applications include:

- Accelerated expansion and accessibility of global markets

- Enhanced product reliability
- 24-hour access to information
- Reduction of costs, including reduction of physical inventory and number of distribution intermediaries

Each Self-Service application provides more specific advantages:

- The Employee Self-Service application provides streamlined, confidential, and secure updates to the employee's address and benefit information.
- The Customer Self-Service application provides streamlined, confidential, and secure processing of orders and viewing item information.
- The Supplier Self-Service application provides streamlined, confidential, and secure supplier transactions.

With improved technology, people are increasingly turning to products that provide real-time services. By allowing users the ability to view certain information on your system, you make it possible for them to get real-time information—for example, current benefit selections, address information, and work time entered.

Note: If you do not have the proper licensing that is required for each Self-Service application, the application will not work properly.

Note: The tasks that are documented in this guide are based on JD Edwards World forms and data that are provided for Self-Service applications. If you have customized your Self-Service site, the navigations, forms, steps, and data shown in these tasks might vary slightly.

Note: Always refer to the latest version of this guide on Customer Connection.

Installation

This guide does not include installation instructions for the J Walk Server for iSeries and Windows, or the Seagull License and Message Server (LMS). See the JD Edwards World A9.1 Web Enablement Install and Configuration Guide for these instructions.

Setting up Additional Information

For all Self-Service applications, consider the following during setup:

- Use .gif files for images. If you use other types of images, use the J WALK Developer Tool Kit to review and change Image file/ID paths.
- Use the Master project for picture albums (Master9100.jwp).

Development Environment

Oracle suggests that you use the most current SEAGULL J Walk Developer and Collector versions when working with your development environment. Oracle can provide this software in addition to the project files that you need for your development environment.

This section contains the following tasks:

- Setting up the development environment
- Retrieving project files

Setting up the Development Environment

You must set up the development environment for all Self-Service applications that you are working with.

You must set two kinds of user options within the Collector process when you create a new AWHOOST file.

This task contains the following topics:

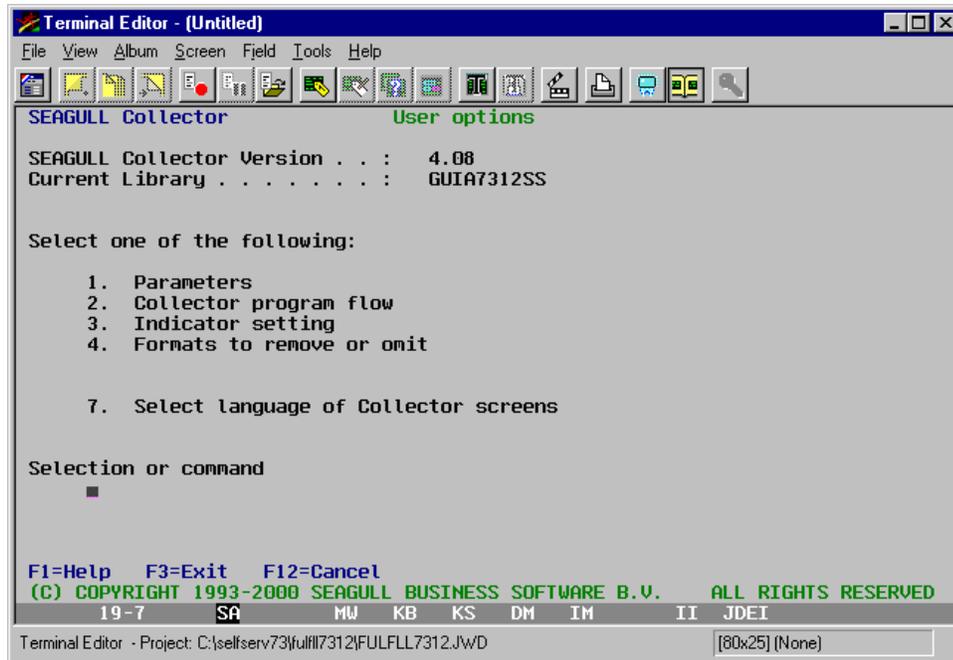
- Setting Collector user options
- Setting other user options
- Activating or deactivating indicators
- Removing or omitting formats

Setting Collector User Options

This task describes how to set the user options for the Collector run.

To set Collector user options

1. To display the User Options menu, press F18 on the main menu.



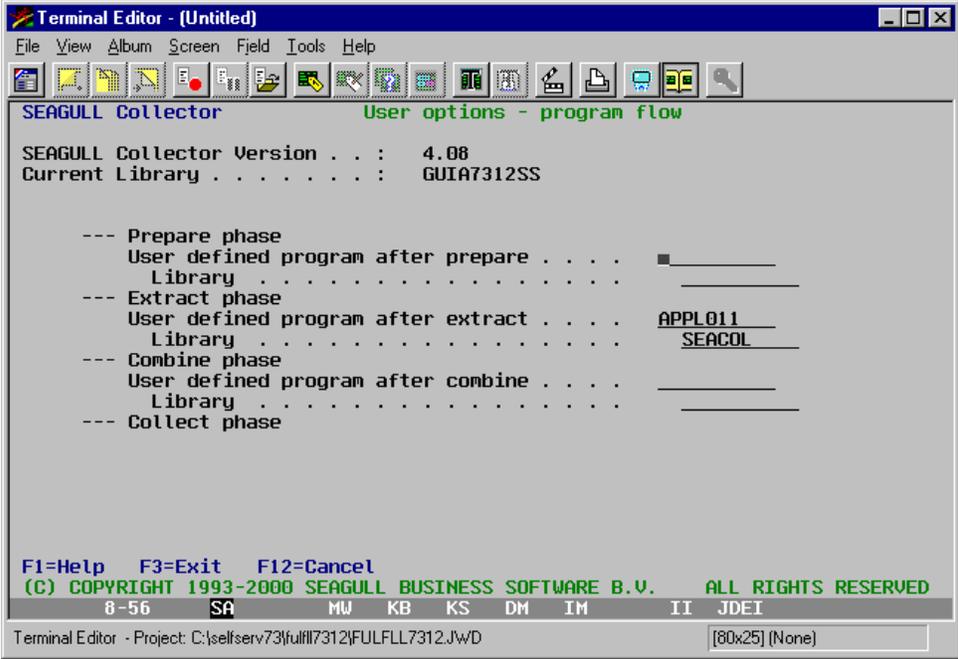
2. To set the Collector program flow, enter 2 on the User Options menu.

Setting Other User Options

You can set other user options, including the program for the extract phase and the library that stores the program.

To set other user options

1. To identify the program for the extract phase, enter APPL011 on the command line.



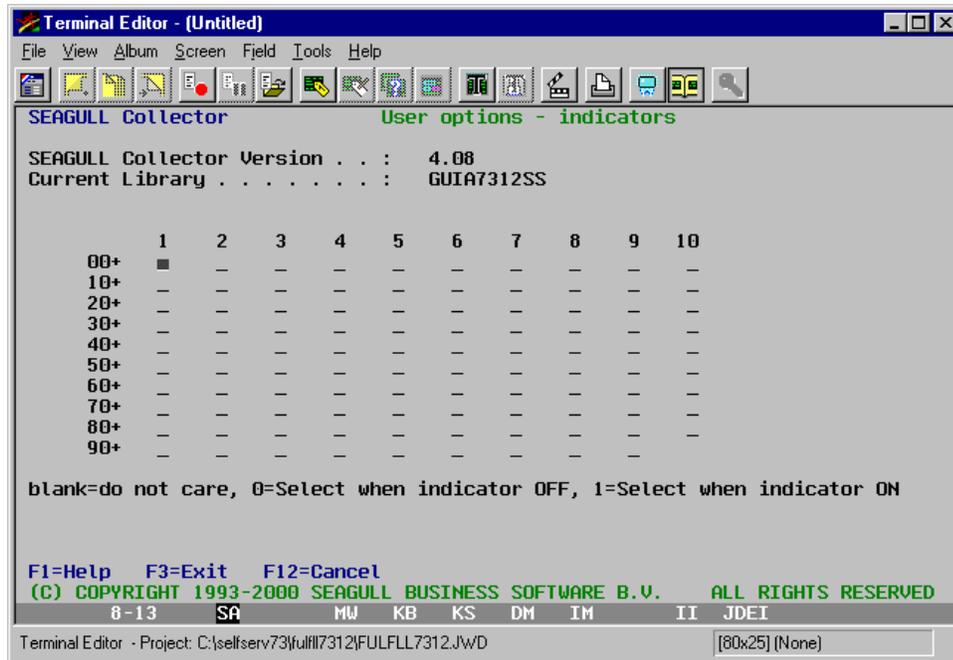
- 2. To identify the library that stores the program, enter SEACOL on the command line.

Activating or Deactivating Indicators

After you set up user options, you can activate or deactivate indicators when you run the Collector. Note that activating or deactivating indicators is not necessary for the Oracle application.

To activate or deactivate indicators

- 1. To display the User options - Indicators screen, enter 3 on the User Options menu.



- Using the values (blank, 0, and 1) at the bottom of the screen, activate or deactivate the indicators.
- To return to the User Options menu, press Enter.

Removing or Omitting Formats

You can remove or omit formats from the Collector.

To remove or omit formats

- On the User Options menu, enter 4.
- To omit the format Assume, enter Assume in the Format field and 0 in the Code field. Note that you can also use this method to omit dummy or clear formats.
- To return to the User Options menu, press Enter.

Retrieving Project Files

The Project Files on the most current installation download for A9.1 Web Enablement contains the files that you must copy to your development environment. The path is Source and will contain the zipped project files.

See *Appendix A – Project Files* for specific file information for each of the following self-service application projects.

- Employee Self-Service project files – A91WV00.zip and SSERM9100 Signon.zip

- Customer Self-Service project files – FULFLL9100.zip, master9100.zip, and Templates.zip
- Supplier Self-Service project files – Supp9100.zip, master9100.zip, and Templates.zip

Employee Self-Service Installation and Setup

This J Walk application is installed automatically when a client uses the Oracle A9.1 Web Enablement Install download. To activate access to this application using a web browser, the administrator who installed this application will need to complete the following tasks.

For a J Walk Server on an iSeries

1. Start the J Walk Server by typing the following on a command line:
SEAJWK/STRJWKSVR PROFILE(ERM91)
2. Once the J Walk Server has been started, the URL can be accessed using a web browser and the following path:
http://your_iSeries/jwalk/erm91.html

Note: Ensure you replace the text `your_iSeries` with the name used for your iSeries, as specified during the install.

For a J Walk Server on Windows,

1. From the Windows server, when the J Walk Server is running, the following icon should display on your icon tray at the bottom right-hand corner of your screen:



If the icon above does not display, start the J Walk Server by doing the following:
Start\Programs\J Walk Server\Start A9.1 Web Enablement Employee Server.

2. Once the J Walk Server has been started, the URL can be accessed using a web browser and the following path:
http://your_Windows_server/erm91.html

Note: Ensure you replace the text `your_Windows_server` with the name used for your Windows server, as specified during the install.

For the Employee Self-Service application, you will need to perform setup tasks on the host iSeries before you can use the individual applications. Refer to the *Employee Self-Service Guide* on Customer Connection. In addition, you will need to verify that

menus, DREAM Writer versions, system constants, and user profiles are set up, and for each application, additional setup considerations might exist.

This section contains the following topics:

- Setting up menus
- Setting up DREAM Writer versions
- Setting up system constants
- Setting up a user profile
- Setting up additional information

Menus and DREAM Writer Versions

The Employee Self-Service application requires the following menus and DREAM Writer versions to be in the environment before the application can be used. The menus and DREAM Writer Versions will have been included in your environment in A91PC00000 and above.

Menus for Employee Self-Service

Menu	Description
G08ESSJW	Employee Resource Online
G08ESS	Employee Resource Setup
G08ESSM	Employee Resource Management

DREAM Writer Versions for Employee Self-Service

DREAM Writer Form	DREAM Writer Title	Self-Service Version
P08334SS	Benefit Enrollment - Rules and Eligibility SS	ZJDESS001
P08336SS	Dependents/Beneficiaries Assignment	ZJDESS001
P01ABSS	Address Book Window	ZJDESS001
P0601SS	Change Federal W-4 for Self Service	ZJDESS001
P06093S	View Vacation-Sick	ZJDESS001
P061121S	Time Entry by Employee	ZJDESS001
P060101	Employee Initial Entry	ZJDESS001

Setting up a User Profile

A generic user profile needs to be created for the Employee Self-Service application, which limits the user's access to this Self-Service application environment.

Employees can access the application by signing on with a user ID (their address book number) and a password (their Social Security Number).

After employees sign on, the application system logs them on with generic user profiles. Before employees can sign on, an administrator must:

1. Create a generic user profile.

A user profile consists of both an IBM profile and a JD Edwards World profile.

2. Add the generic profile in User Information (G94) screen.

3. Include the generic profile name in the J Walk text file (.JWM).

You can edit the text file using MS WordPad or another text editor.

See the section *To set up a user profile*, for more information on how to complete the three tasks just mentioned in this section.

If an employee signs on and the system does not find the generic profile, the system issues the following error message:

User Sign on is Invalid. Please contact your Administrator.

Within the user profile, you must specify the following:

- User ID
- Passwords
- Preferences (such as language)
- Menu G08ESSJW (so that the user can access only the menu and the respective programs for the applicable environment)

Before You Begin

- Ensure that you have defined the libraries for the Self-Service application that you are working with.

To set up a user profile

1. Using the IBM command CRTUSRPRF, complete the following fields as follows:

- Special Authority (SPCAUT)

Enter *JOBCTL

- Group Profile (GRPPRF)

Enter JDE

- Initial Program (INLPGM)

Enter either J98INIT or J98INITA

• Job Description (JOBID)

Enter a job description that can be used with this user profile or enter the name of the USERID being created (This requires you to create a job description first)

2. From the Security Officer menu (G94), choose User Information.
3. Enter the User ID. When you are working with the user ID J98INIT, enter the following in the Library List field:

QTEMP	SECLIB	COMLIB	DTALIB	OBJLIB	QGPL
-------	--------	--------	--------	--------	------

4. In the Initial Menu to Execute field, enter G08ESSJW.
5. In the Allow Command Entry (Y/N) field, enter Y.
6. In the Allow Menu Traveling (Y/N) field, enter Y.
7. In the Allow Fast Path (Y/N) field, enter N.
8. When you are working with user ID J98INITA, proceed to menu G944 and choose Library List Revisions.
9. Add an environment with the equivalent libraries:

QTEMP	SECLIB	COMLIB	DTALIB	OBJLIB	QGPL
-------	--------	--------	--------	--------	------

10. Return to the Library List Control menu (G944), choose User Sign on List Revisions, and then add the new environment for the Self-Service application.

See Also

- Technical Foundation Guide for more information about security setup and maintenance
- The white paper, World Software Security, which is available on Customer Connection (Product/Software Updates/3385954), for additional security information as well as a software update that you can download.

Additional Employee Self-Service Setup

To print within the ERM Self-Service application, the administrator who installs the ERM SS app needs to verify that on the 2 different files, SSERM9100.JWM and WV9100.JWM, the appropriate text file entries are set accordingly.

Use a text editor tool such as MS Notepad or MS WordPad to open the SSERM9100.JWM and WV9100.JWM files, located in the Working Directory in the JWALK.INI file.

For iSeries-i5 Installation:

The JWALK.INI file is within the IFS under /Your iSeries-i5 Web Server root folder/SEAJWK

For Windows NT-2000-2003 Server and J Walk Client for Windows Installations:

The JWALK.INI file is within C:\Program Files\SEAGULL\J Walk Server\4.1xxx.x.xxx\

Example paths for location of SSERM9100.JWM and WV9100.JWM:

For iSeries-i5 Installation:

Your iSeries-i5 Web Server root folder/JWALK/ JWALKAPP/ERM9100APP/

For Windows NT-2000-2003 Server and J Walk Client for Windows Installations:

C:\Inetpub\wwwroot\ JWALKAPP\ERM9100APP\

SSERM9100.JWM and WV9100.JWM Text File Entry Updates:

ERMSSURL set to path for the type of install:

If NT Java Client, http://<PC server name>/Docs/

If Native Java Client install, //iSeries machine name/Docs/

INSTALL default is WAS. This value only needs to be reset when using an NT Java Client. If Java Client with NT, this value should be changed to NT.

ERMURL set to path for the type of install:

If NT Java Client, //<PC server name>

If Native Java Client install, //iSeries machine name

PASSW and USERID should contain the values for the generic Userid and Password for Employee Self-Service.

Two folders will be used in the ERM application. The Docs and Reports folders will be added during the installation. These folders will be added to the respective type of install paths. For NT Java Client, it is Inetpub/wwwroot. For Native iSeries Java Client, the Docs and Reports folders must be copied manually from ROOT into www/apachedft/htdocs or another HTTP server folder.

The Docs folder contains the documents (.DOC, .XLS, or .PDF) used within the ERM SS or any other SS application screens.

The Reports will contain the WRKSPLF file saves when printing any ERM SS application report or any other Web Enablement WRKSPLF file.

Employee Self-Service Tips

- Set up only one environment for the generic user. If you choose to add more than one environment for the generic user, this application will not function properly.
- When signing on, the user must enter an employee number and the social security number for this employee as the password. A script within this application will verify whether a valid employee number was entered or a matching social security number for this employee is found. If any of these

conditions fail, the user will not have access to the Employee Self-Service environment and the menu G08ESSJW.

- Text file entries within the .JWM for this project need to be changed for the alert message to display when adding a dependent or beneficiary.

To change the text file entries, use a text editor tool such as MS Notepad or MS WordPad to open the SSERM9100.JWM and WV9100.JWM files, located in the Working Directory in the JWALK.INI file.

For iSeries-i5 Installation:

- The JWALK.INI file is within the IFS under /Your iSeries-i5 Web Server root folder/SEAJWK

For Windows NT-2000-2003 Server and J Walk Client for Windows Installations:

- The JWALK.INI file is within C:\Program Files\SEAGULL\J Walk Server\4.1xxx.x.xxx\

Example paths for location of SSERM9100.JWM and WV9100.JWM:

For iSeries-i5 Installation:

- Your iSeries-i5 Web Server root folder/JWALK/JWALKAPP/ERM9100APP/

For Windows NT-2000-2003 Server and J Walk Client for Windows Installation:

- C:\Inetpub\wwwroot\ JWALKAPP\ERM9100APP\

SSERM9100.JWM and WV9100.JWM Text File Entry Updates:

1. Change text file entry DSPDEPBENA from blank to Y.
 2. Add alert message to text file entries DEP BENALR1 – DEP BENALR6.
- Some setup is required to ensure the successful delivery of reports through e-mail.

The following steps set up the From address for e-mail messages sent from Employee Resource Management. Ensure the From address is set to a valid address that gets through the firewall issues when sending e-mail message to outbound source.

On the iSeries command line, type the following commands:

1. WRKDIRE USRID (<Generic User Profile> <iSeries machine name>). Press Enter.
2. Type 2 on the line that has the Generic User profiles set up for Employee Resource Management. Press Enter.
3. Press F19. Press Enter.
4. Complete the following fields with the respective portions of the e-mail address.

a. SMTP User ID.....John_Doe

b. SMTP Domain.....companyname.com

Example of From e-mail address: John_Doe@companyname.com

5. Press Enter until return to main menu.

To allow e-mail messages to be sent from the iSeries

1. Create authority for the generic user ID on the iSeries.

On the iSeries command line, type the following commands:

```
->ADDDIRE USRID(JD44444 MY_ISERIES) USRD('John Doe') USER(JD44444)
```

Where MY_ISERIES is the iSeries machine name and JD44444 is the generic user ID.

```
->ADDDIRE USRID(INTERNET GATEWAY) USRD('Allow OV/400 to send
INTERNET Mail') SYSNAME(INTERNET) MSFSRVLVL(*USRIDX)
PREFADR(NETUSRID *IBM ATCONXT)
```

```
->CHGDSTA SMTPRTE(INTERNET GATEWAY)
```

2. If you have a firewall and/or a mail proxy, on the OS/400 command line type the following on the command line:

```
->CHGSMTPA MAILROUTER(MAIL.ROUTER.NAME) FIREWALL(*YES)
```

3. Ensure that mail.router.name is in the AS/400 Host Table (CFGTCP, Option 10) or can be resolved via your Name Server (DNS).

After all configurations are complete, do the following:

4. On the iSeries command line, type the following:

```
->ENDTCPSVR *SMTP
```

5. Press Enter.

6. On the iSeries command line, type the following:

```
->ENDMSF
```

7. Press Enter.

8. On the iSeries command line, type the following:

```
->STRTCPSVR *SMTP
```

9. Press Enter.

10. On the iSeries command line, type the following:

```
->STRMSF
```

11. Press Enter.

12. On the iSeries command line, type the following:

```
->WRKACTJOB SBS(QSYSWRK)
```

13. Press Enter.
14. In the display that results from step 12, verify that there are:
 - a. 3 jobs named QMSF running
 - b. A job named QTSMTPBRCL running
 - c. A job named QTSMTPBRSR running
 - d. A job named QTSMTPCLNT running
 - e. A job named QTSMTPSRVR running

Note: If e-mail does not work after following the above instructions above, you can do some preliminary troubleshooting by looking at the job logs for QMSF and for QTSMTPBRSR, QTSMTPBRCL, QTSMTPCLNT, and QTSMTPSRVR. If any of these jobs is not running, check the job logs.

Most error messages found in those logs have a workable recovery procedure or lead to a PTF.

- Create a folder on the iSeries. It is recommended to use SSERM as the folder name.

Type in the following command on the iSeries to create the SSERM folder:

```
CRTFLR FLR(SSERM) TEXT('Employee Self-Service E-mail Reports')
```

To return to the User Options menu, press Enter.

If a different folder name is used, the text file entry SNDDSTFLR in the two .JWM files will need to be updated with this new folder name.

To change the text file entry SNDDSTFLR, use a text editor tool such as MS Notepad or MS WordPad to open the SSERM9100.JWM and WV9100.JWM files, located in the Working Directory in the JWALK.INI file.

For iSeries-i5 Installation:

- The JWALK.INI file is within the IFS under /Your iSeries-i5 Web Server root folder/SEAJWK

For Windows NT-2000-2003 Server and J Walk Client for Windows Installations:

- The JWALK.INI file is within C:\Program Files\SEAGULL\J Walk Server\4.1xxx.x.xxx\

Example paths for location of SSERM9100.JWM and WV9100.JWM:

For iSeries-i5 Installation:

- Your iSeries-i5 Web Server root folder/JWALK/JWALKAPP/ERM9100APP/

For Windows NT-2000-2003 Server and J Walk Client for Windows Installation:

- C:\Inetpub\wwwroot\ JWALKAPP\ERM9100APP\

Customer Self-Service Installation and Configuration

Overview

Businesses can use the JD Edwards World Self-Service Customer application suite at any time for transactions such as order processing, checking current inventory, and account information. With minimal setup on your part, the user can work from a remote site. For example, when using Customer Self-Service you can enter orders, inquire on the status of orders, and review item and billing information through the Customer application system.

Customer Self-Service also provides special item ordering within the Product Catalog functionality. These groups of panels provide a path for the user to choose specific item(s) and then add them to an order. Users can also make changes or deletions to these items within the order.

Setup

This J Walk application is installed automatically when a client uses the Oracle A9.1 Web Enablement Install download. To activate access to this application using a web browser, the administrator who installed this application will need to complete the following tasks.

For a J Walk Server on an iSeries,

1. Start the J Walk Server by typing the following on a command line:
SEAJWK/STRJWKSVR PROFILE(FULFLL91)
2. Once the J Walk Server has been started, the URL can be accessed using a web browser and the following path:

http://your_iSeries/jwalk/fulfl191.html

Note: Ensure you replace the text `your_iSeries` with the name used for your iSeries, as specified during the install.

For a J Walk Server on Windows:

1. From the Windows server, when the J Walk Server is running, the following icon should display on your icon tray at the bottom right-hand corner of your screen:



- If the icon above does not display, start the J Walk Server by doing the following: Start\Programs\J Walk Server\Start A9.1 Web Enablement Customer or Fulfillment Server.
2. Once the J Walk Server has been started, the URL can be accessed using a web browser and the following path:

`http://your_Windows_server/fulfill91.html`

Note: Ensure you replace the text `your_Windows_server` with the name used for your Windows server, as specified during the install.

For the Customer Self-Service application, you must perform certain setup tasks on the host iSeries before you can use the individual applications. The setup tasks generally involve verifying that the menus, DREAM Writer versions, system constants, and user profiles are set up, and for each application, additional setup considerations might exist.

This section contains the following topics:

- Setting up menus
- Setting up DREAM Writer versions
- Setting up system constants
- Setting up a user profile
- Setting up additional information

Setting up Menus

The Customer Self-Service application requires the following menus and DREAM Writer versions to be in the environment before the application can be used. The menus and DREAM Writer Versions will have been included in your environment in A91PC00000 and above. The following table describes various codes that are used in the menu descriptions:

S	=	Selection
JE	=	Job to execute
B	=	Batch
H	=	Highlight
OC	=	Option Code
OK	=	Option Key
AO	=	Application Override

See Also

- Menu Design in the Technical Foundations Guide for more information about menu setup and maintenance
- Documentation can also be found on Customer Connection

Menus for Customer

You must verify this menu information for G00FF and apply any needed security.

Menu 1: G00FF

Field	Value
Menu ID	G00FF
Menu Title	Customer Self-Service Application
Level of Display	4
Menu Class	1

S	Description	JE	B	H	Help Inst Key	OC	OK	Version	AO
01	Account Information	J032002	0	0	P032002	1	P032002	ZJDESS001	03
02	Enter Orders (Line Mode)	J4201A	0	0	P4201A	1	P4201A	ZJDESS001	42
03	Customer Service	J42045	0	0	P42045	1	P42045	ZJDESS001	42
04	Product Availability	J41202	0	0	P41202	1	P41202	ZJDESS001	41
05	Address Book Revisions	J01051	0	0	P01051	1	P01051	ZJDESS001	01
06	Account Status	J03203	0	0	P03203	1	P03203	ZJDESS001	03
07	Delivery Notes	J42290	0	0	P42290	1	P42290	ZJDESS001	42
08	Item Search	J41200	0	0	P41200	1	P41200	ZJDESS001	41
09	Enter Orders (Page Mode)	J4211	0	0	P4211	1	P4211	ZJDESS001	42
10	Customer Billing Instructions	J4206	0	0	P4206				42

S	Description	JE	B	H	Help Inst Key	OC	OK	Version	AO
16	Display Product Catalog	P41905	0	0	P41905	2	P41905	ZJDESS001	41A
17	Revise Single Business Unit	J0006	0	0	P0006				00
18	Product Catalog Item Search	J41907	0	0	P41907	1	P41907	ZJDESS001	98
24	Get Customer Number	J0092	0	0	P0092				94

See Also

- DREAM Writer in the Technical Foundation Guide for more information about DREAM Writer setup and maintenance

DREAM Writer Versions for Customer

Use the following table to verify DREAM Writer versions that contain the processing options for each program selection on menu G00FF.

DREAM Writer Form	DREAM Writer Title	Copy From Pristine Version	Create New Version
P032002	Customer Ledger Inquiry with SQL	ZJDE0001	ZJDESS001
P4201A	Single Line Sales Order Entry	ZJDE0001	ZJDESS001
P42045*	Sales Order Information	ZJDE0001	ZJDESS001
P41202*	Item Availability	ZJDE0001	ZJDESS001
P01051*	Address Book – Phone Number	ZJDE0001	ZJDESS001
P03203	Item Account Status Summary	ZJDE0001	ZJDESS001
P42290	Delivery Note History Inquiry	ZJDE0001	ZJDESS001
P41200	Item Search with Word Search	ZJDE0001	ZJDESS001
P4211*	Sales Order Entry	ZJDE0001	ZJDESS001

*Additional Considerations

Some programs contain processing options that might affect the appearance of some Self-Service panels. For the following programs and processing options, review and change the values as necessary:

- P42045 (Sales Order Information): processing options 7 and 8 on the Processing Control tab
- P41202 (Item Availability): processing options 15 and 16 on the Grade and Potency tab
- P01051 (Address Book - Phone Number): processing option 1
- P4211 (Sales Order Entry):
Processing options 20 - 23, 25, 34, 35, and 39 - 41 on the Prompting Control tab
Processing options 44, 46, 52, 64, 71, and 72 on the Cross Reference Information tab

Setting up System Constants

System constants are settings that apply to all branch/plants and determine which functions the system performs. You cannot customize the system constants for individual branch/plants.

To set up system constants

1. From menu G4241, choose Branch/Plant Constants.
2. To access the System Constants window, press F10.
3. In the ECS Control field, enter N.
4. To return to menu G4241, press F3 twice.
5. From menu G4241, choose Default Location & Printers.
6. Enter a branch/plant where the user has authority to place orders.

See Also

Inventory Management Guide for more information about setting up company constants and about default locations and printers

Setting up a User Profile

After you have identified the user's address book number, you must use that address book number to set up a user profile that limits the user's access to Self-Service application environments. A user profile consists of both an IBM profile and a JD Edwards World profile. The user cannot sign on without a user profile.

In the user profile, you must specify the user ID, password, and preferences, such as language. Within the user profile, you must also specify the appropriate menu so that the user can access only the menus and the respective programs for the applicable environment.

Before You Begin

- Ensure that you have defined the libraries for the Self-Service application that you are working with.

To set up a user profile

1. Using the IBM command CRTUSRPRF, complete the following fields as follows:

- Special Authority (SPCAUT)

Enter *JOBCTL

- Group Profile (GRPPRF)

Enter JDE

- Initial Program (INLPGM)

Enter either J98INIT or J98INITA

- Job Description (JOBDD)

Enter a job description that can be used with this user profile or enter the name of the USERID being created (This requires you to create a job description first)

2. From the Security Officer menu (G94), choose User Information.
3. Enter the User ID. When you are working with the user ID J98INIT, enter the following in the Library List field:

QTEMP	SECLIB	COMLIB	DTALIB	OBJLIB	QGPL
-------	--------	--------	--------	--------	------

4. In the Initial Menu to Execute field, enter G00FF.
5. In the Allow Command Entry (Y/N) field, enter Y.
6. In the Allow Menu Traveling (Y/N) field, enter Y.
7. In the Allow Fast Path (Y/N) field, enter N.
8. In the Employee Address Number (PPAT) field, enter the identification number for the approval review process.
9. When you are working with user ID J98INITA, proceed to menu G944 and choose Library List Revisions.
10. Add an environment with the equivalent libraries:

QTEMP	SECLIB	COMLIB	DTALIB	OBJLIB	QGPL
-------	--------	--------	--------	--------	------

11. Return to the Library List Control menu (G944), choose User Sign on List Revisions, and then add the new environment for the Self-Service application.

See Also

- Technical Foundation Guide for more information about security setup and maintenance
- The white paper, World Software Security, which is available on Customer Connection (Product/Software Updates/3385954), for additional security information as well as a software update that you can download.

Setting up Additional Information

You must set up the following additional information for the Customer Self-Service application:

- Create two activity status codes
- Create a document type
- Create an order activity rule for the document type
- Set up status range variables
- Verify menu G00FF DREAM Writer settings.
- Verify the Online Invoice Inquiry program (P42230)

Additionally, review the additional set up considerations for the Customer Self-Service application.

To create two activity status codes

1. From the Sales Order Management Setup menu (G4241), choose Order Activity Rules and press F6 - Execute.
2. On Order Activity Rules, locate a Sales Order (SO) Order Type.
3. Make note of the value in the Status Code field on the first line and exit the program.
4. From the Sales Order Management User Defined Codes menu (G42411), choose Activity/Status Codes.
5. On Activity/Status Codes, page down to line with the status code you noted.
6. Add or choose two new status code values that have a lower value than the value you noted in the Status Code field of the SO Order Activity Rule program.
7. Exit the program.
8. From the Sales Order Management Setup menu (G4241), choose Order Activity Rules and press F6 - Execute.
9. On Order Activity Rules, locate a Sales Order (SO) Order Type.

10. Add these two new status code values in front of the noted value line.

To create a document type

1. From the Sales Order Management User Defined Codes menu (G42411), choose Document Types.
2. On Document Types, add a document type and description.
For example, enter document type SH - Customer SS Shopping Cart.

To create and order activity rule for the document type

1. From the Sales Order Management Setup menu (G4241), choose Order Activity Rules and press F6 - Execute.
2. On Order Activity Rules, locate a Sales Order (SO) Order Type.
3. Enter the new document type in the Order Type field and click Add.
4. Locate the new document type.
5. Page down to the first blank line and enter S in the following field:
 - Line Type
6. Enter the first new status code in the following field:
 - Status
7. Complete the following field:
 - Description
8. Enter the second new status code in the following field:
 - Next Status
9. On the next blank line, complete steps 3 through 8 for the second status code.
10. Enter the retained status code from the first line of document type SO in the following field and click Change:
 - Next Status
11. Locate the new document type.
The first two lines should have the new status codes.

To set up status range variables

The administrator installing the Customer Self-Service application must verify that the appropriate text file entries are set accordingly in the FULFLL9100.JWM file within the Customer Self-Service deployed client.

To change the text file entries, use a text editor tool such as MS Notepad or MS WordPad to open the FULFLL9100.JWM file, located in the Working Directory of the JWALK.INI file.

For iSeries-i5 Installation:

The JWALK.INI file is within the IFS under /Your iSeries-i5 Web Server root folder/SEAJWK

For Windows NT-2000-2003 Server and J Walk Client for Windows Installations:

The JWALK.INI file is within C:\Program Files\SEAGULL\J Walk Server\4.1xxx.x.xxx\

Example paths for location of FULFLL9100.JWM:

For iSeries-i5 Installation:

Your iSeries-i5 Web Server root folder/JWALK/ JWALKAPP/ERM9100APP/

For Windows NT-2000-2003 Server and J Walk Client for Windows Installations:

C:\Inetpub\wwwroot\ JWALKAPP\ERM9100APP\

FULFLL9100.JWM Text File Entry Updates:

SHOPSTAT1 set to the first new status code, the initial shopping status

SHOPSTAT2 set to the second new status code

SHOPSTAT3 set to the first line of the Sale Order Order Activity Rule

To verify menu G00FF DREAM Writer settings

Verify the following settings:

- P4201A (Sales Order Entry - Single Line):
ZJDESS001 and ZJDESS004
Document Type processing option is set to the new document type
- P4211 (Sales Order Entry - Detail):
ZJDESS001 and ZJDESS006
Document Type processing option is set to the new document type
Online Invoice processing option is set to ZJDESS001

To verify the online invoice inquiry program (P42230)

- P42230 (Online Invoice Inquiry) (available on Versions List):
ZJDESS001

Order Type processing option is set to the new document type

From Status Code processing option is set to the initial shopping status

Additional Set up Considerations

For the Customer Self-Service application, consider the following during setup:

- Ensure that you have set up a default branch/plant for each user.
- The Customer ID that has been set up for a user is the default ID on all screens. This Customer ID also appears in the Sold To field. The SoldTo/Customer ID is the default for the Ship To field. However, the user can set up Related Addresses by taking path 3/G01, Address Book, inquiring on the Sold To address number and hitting F9 to get to Related Addresses. Any addresses that are set up here will be able to be chosen for the Ship To field within Order Entry and Product Catalog Order Entry.
- When you are performing an item search, you can use the search button to view additional items.
- The Order Status screen displays orders by using a status range that you can modify. Replace the values in the From and To date fields according to the following guidelines:
 - For active orders, specify a status range with the values of SHOPSTAT1 to 560
 - For shipped orders, specify a status range of 580 to 620
 - For closed orders, specify a status range of 999 to 999
- Use the current date on screens that have input-capable dates. To change this date, use the calendar button to the right of the Date field to select the correct date.
- Use .gif files for images. If you use other types of images, use the J Walk Developer Tool Kit to review and change Image file/ID paths.
- Use Master9100.jwp for picture albums.
- The Customer Self-Service project has a new push button in panel 26 (video V42045), which can be used for Forms Software manipulation from your iSeries. This button needs to have scripting added to the Action Tab to set up accessibility to your Forms Software on the iSeries.

Some set up is required to activate this button for usage. Change the following text file entry (.JWM file field), CREATARCH, with descriptive text for the type of Forms Software of your iSeries.

To change the text file entries, use a text editor tool such as MS Notepad or MS WordPad to open the FULFLL9100.JWM file, located Working Directory in the JWALK.INI file.

For iSeries-i5 Installation:

- The JWALK.INI file is within the IFS under /Your iSeries-i5 Web Server root folder/SEAJWK

For Windows NT-2000-2003 Server and J Walk Client for Windows Installations:

- The JWALK.INI file is within C:\Program Files\SEAGULL\J Walk Server\4.1xxx.x.xxx\

Example paths for location of FULFLL9100.JWM:

For iSeries-i5 Installation:

- Your iSeries-i5 Web Server root folder/JWALK/JWALKAPP/FULFLL9100APP/

For Windows NT-2000-2003 Server and J Walk Client for Windows Installation:

- C:\Inetpub\wwwroot\ JWALKAPP\FULFLL9100APP\

FULFLL9100.JWM Text File Entry Updates:

FULFLSSURL set to path for the type of install:

- If NT HTML Client, http://<PC server name>/Docs/
- If WebSphere or Java Client install, //iSeries machine name/Docs/

Product Catalog within Customer Self-Service

Product Catalog Overview

A Product Catalog was added to the current Self-Service, which provides more robust functionality related to generating, maintaining, and viewing current catalog information through the Self-Service applications.

Users are now able to control parts of the Product Catalog creation and maintenance process through various custom JD Edwards World applications.

New applications, files, and processes allow users to generate catalog relationships. Once you create the relationships, they are accessible via the Self-Service J Walk® applications.

Functionality Overview

You can use multiple methods to build the structure of the Product Catalog. In each method, you create catalog items in the Item Master Information and/or Item Branch/Plant Information files. These items are actually the catalog names and catalog categories. Each item will have a designated stocking type of 4 identifying them as catalogs in the Self-Service applications.

The next step is to organize lower level catalogs and items into parent catalogs to form your catalog structure. If you choose to include a branch/plant as part of your catalog setup, you will need to set up your catalog names in the Item Branch/Plant form (P41026). Alternatively, you can leave branch/plant blank for a more generic catalog. Either way, you can include actual items from any branch/plant in any catalog.

The Product Catalog, at the most basic level, will be a set of records in the Product Catalog Relationship file. Individual Product Catalog Relationship records are created using a simple maintenance form.

Set Up Considerations

Ensure you review Program Specification Information section of this guide for important information on processing options, processing options changes and additions, error messages, and troubleshooting for the different programs

Care must be taken in setting up the Product Catalog. Three areas which warrant close attention are Item Stocking Types, Product Catalog DREAM Writer versions for sales order entry, and customer master file information for address book records set up for people who peruse the catalog online.

* Items with stocking types of K (Kit) and C (Configured Item) are not supported and could cause unexpected results if selected for use on the Product Catalog.

DREAM Writer Versions

When calling the Line Mode Sales Order Entry (P4201A) from Product Catalog, use DREAM Writer version ZJDESS004. When calling the Page Mode Sales Order Entry (P4211), use DREAM Writer version ZJDESS006.

Processing Option for Enter Orders (Line Mode) P4201A

DEFAULT VALUES:

Common:

2. Line Type _____

The value for Line Type should be setup with blanks.

KIT PROCESSING:

20. Enter '1' to prevent kit components from being written. If left blank kit components will be written to the Sales Detail File (F4211). _____

21. Enter '1' to suppress the display of kit component lines. If left blank, kit component lines will be displayed. _____

22. Enter '1' to suppress availability information in the Kit Window. If left blank, availability will be displayed. _____

COMMITMENT CONTROL (CONT.)

26. Enter '1' to automatically display the Supply and Demand Inquiry when a new line is backordered. _____

CROSS REFERENCE INFORMATION:

30. Enter the cross reference type to use when searching for substitute items. _____

31. Enter the cross reference type to use when searching for replacement items. _____

32. Enter the cross reference type to use when searching for associated items. _____

33. Enter '1' to order the substitute item with its own Unit Price. If left blank, will use the original item's Unit Price. _____

CURRENCY PROCESSING

39. Enter a tolerance limit percentage to warn of radical currency rate change (enter 15 to indicate a 15% +/- change). _____

CONFIGURATOR PROCESSING

43. Enter one of the following for the mode of Specification Entry. If left blank, '2' will be used:
'1' = Text Mode
'2' = Assisted Mode
'3' = Assisted Prompt Mode _____

BLANKET/QUOTE PROCESSING

47. Enter a '1' for automatic access to the blanket/quote release processing. If left blank, no automatic blanket/quote release processing will be performed. _____

Processing Option for Enter Orders (Page Mode) P4211

ORDER DUPLICATION DEFAULT VALUES

14. Document Type _____
15. Beginning Status _____
16. Enter text duplication selection
'1' to copy line text
'2' to copy line and order text
'3' to copy order text _____

21. Display Headings first. 1 _____
22. Be prompted to accept the order. 1 _____

NOTE: Two-cycle order entry is not recommended for configured items.

23. Allow the addition of a Customer Master record, if not set up. _____
27. Order Margin Checking _____
28. Order Line Margin Checking _____

LINE CONTROL STATUS

33. Enter the next status code beyond which a detail line cannot be changed. If left blank, no restriction will be put on the changing of a line. _____

FIELD DISPLAY CONTROL

Enter '1' to protect or '2' to suppress
34. Cost Fields _____
35. Price Fields _____

CROSS REFERENCE INFORMATION

44. Enter the Cross Reference Type for:

- Substitute Items _____
- Associated Items _____
- Replacement Items _____

45. Enter '1' to use the substitute item's Unit Price. If left blank, the original item's price will be used to order the substitutes. _____

KIT PROCESSING

46. Enter '1' to prevent Kit Components from being written. If left blank, they will be added to the sales detail file. _____

47. Enter '1' to suppress Kit Component lines. _____

48. Enter the version of Kit Inquiry to call. If left blank, version ZJDE0001 will be called. _____

49. Enter '1' to suppress availability information in the Kit Window. _____

AUTOMATIC PROCESSING

52. Enter '1' to automatically display the Supply and Demand screen when a new sales detail line is backordered. _____

WAREHOUSE PROCESSING (Continued)

70. Enter an override next status for sales order lines for which requests have been generated. _____

ORDER TEMPLATE PROCESSING

71. Enter a '1' to use the Sold-to address number for order templates, or a '2' to use the Ship-to address number. If left blank, no automatic order template processing will be performed. _____

Customer Set up Considerations

Ensure you have Customer PO Required set to N (No) in the customer billing instructions.

Generic Text Definition

There are six application records that are included in the Generic Text Definitions file. These definitions will be used later in the Product Catalog. To verify these application records, access the Developer's Workbench menu (G9362) and select the option Generic Text Definition.

00161		Generic Text Definition	
Action Code	. . . . . I		
Application	. . . . . *PRODUCTDOCS	Long Description	
Window Width	. . . . . 2	Generic Text Key Length.	
Install System	. . . . .	File ID	. . . . . F41903
Reporting System	. . . . .	Ownership (JDE/User)	. . . . .
. Composite Key Definition			
Key	Data	Description	Ovr Displ
Seq	Item		Dsc (1/0) Size Dec Type Size
10	ITM	Item/Catalog Number	Y 1 8 0 S 8
20	MCU	Branch Plant	Y 1 12 A 12
30			Y
40			Y
50			Y
60			Y
70			Y
80			Y

Total Composite Key Length			. . . . . 20
			Allowed. 040

1. Inquire on each of the six applications to ensure the records exist.

- *PRODUCTDOCS Long Description
- *PRODUCTDSC Network Description
- *PRODUCTOTH1 Product Catalog Links (Other 1 Key)
- *PRODUCTOTH2 Product Catalog Links (Other 2 Key)
- *PRODUCTOTH3 Product Catalog Links (Other 3 Key)
- *PRODUCTPICS Product Catalog Links (Pictures)

Creating a Product Catalog

The following are the steps required to create a product catalog:

- Determine which items will be included in the Product Catalog
- Categorize those items within individual catalogs
- Establish primary catalogs; these are the catalogs that will be displayed upon entry into the Self-Service application
- Create the catalogs within the Item Master Information form (P4101) and the Item Branch/Plant form (P41026)-optional

Setup the catalogs in the Catalog Detail Information form (P41903). Setup for the primary catalogs is mandatory. All other catalogs and items are optional

Create the relationship records between the catalogs and items in the Catalog Relationship Maint form (P41904)

To set up catalog names

All catalog names must be created and defined in the Item Master Information form.

From the Product Catalog Management menu (G41900), choose Item Master Information (P4101).

```

G41900                Oracle                JDED
                    Product Catalog Management
... Catalog Setup
  2. Catalog Detail Information
  3. Catalog Relationship Maint
... Catalog Inquiry
  6. Item Master Information
  7. Item Branch/Plant Information

Selection or command
===>

Wed, Aug 20, 2003    A7.3 Development W/ANALYZER    JD5555555
1:22:12pm           (C)                            QPADEV0109
  
```

1. Add catalogs using 4 as the Stocking Type.

```

4101      Item Master Information      Item Number - Short. 545078
Action Type. . I
Product No . . Tires
Catalog No . . Passenger Cars- Tires
                Desc Tires Snow and Highway tires
                Srch Tires Snow tires
Stocking Type. . . . . 4
G/L Class. . . . . IN20
Unit of Measure. . . . EA
                Line Type. . . . . S
                Bulk/Packed Flag . . . P
Item Price Group . . . . .
Basket Reprice Group . . . . .
Order Reprice Group. . . . .
Dispatch Group . . . . .
                Inventory Cost Level . 2
                Sales Price Level. . . 2
                Purchase Price Level . 3
                Kit Pricing Method . . -
Backorders Allowed . . Y
Check Availability Y/N Y
Shelf Life Days. . . . .
ABC Codes. . . . . - - - -
                Serial No. Required. . N
                Lot Status Code. . . . -
                Lot Process Type . . . -
                Commitment Method. . . 1
Planner Number . . . . .
Buyer Number . . . . .
Print Message. . . . .
                Item Flash Message . . -
                Std UOM Conversion . . -
                F5=Codes F8=Measures F10=Manufacturing F13=Branch/Plant F24=More Keys
  
```

2. The following fields are required when adding a catalog:

- Product No
 - Desc
 - Catalog No
 - Srch
 - Stocking Type
3. Press Enter or F13 to access the Item Branch/Plant Information form (41026) and type optional catalog information. Item Branch/Plant can also be accessed from menu G41900. The step is optional for catalog type '4' items.

```

41026      Item Branch/Plant Information      Branch/Plant . . . National Tires
Action Code . . . . . I
Item Number. . . . . Tires
-----
Stocking Type. . . . . 4                      Line Type. . . . . S
G/L Class. . . . . IN20
-----
Item Price Group . . . . .
Basket Reprice Group . . . . .
Order Reprice Group. . . . .
-----
Backorders Allowed . . Y                      Serial No. Required. . N
Check Availability Y/N Y                      Lot Status Code. . . .
Shelf Life Days. . . . .
ABC Codes. . . . . - - - -
Margin Maintenance (%) -----
-----
Country of Origin. . . . . United States
Planner Number . . . . .
Buyer Number . . . . .
Supplier . . . . .
Print Message. . . . .
-----
F5=Codes  F6=Cost  F9=Price  F10=Manufacturing  F15=Bulk Info  F24=Keys
    
```

4. Use the Stocking Type of 4, to designate a catalog.
5. On the Item/Branch Plant Information form (41026), complete the following optional fields:
- Branch/Plant
 - Item Number

To set up the catalog detail information

From the Product Catalog Management menu (G41900), choose Catalog Detail Information.

1. Inquire on the catalog. Specify a Branch/Plant if necessary.
2. Change the action to A and complete the following fields:
 - Effective Dates: From and To

- Display
- Primary
- Status

3. Press Enter to add the record.

```

41903                Catalog Detail Information
Action Type          I
Item Number. . . . . Tires                Branch/Plant .
Description. . . . .
Effective Dates: From: 01/01/02 To: 01/06/04 Display _ Primary P Status A
Links: Press F5 on link below to view detail
Picture Key         Network Desc          Long Desc          Other 1   Other 2   Other 3
Catalog Category Codes:
CAT1  PTR          CAT11          CAT21
CAT2          CAT12          CAT22
CAT3          CAT13          CAT23
CAT4          CAT14          CAT24
CAT5          CAT15          CAT25
CAT6          CAT16          CAT26
CAT7          CAT17          CAT27
CAT8          CAT18          CAT28
CAT9          CAT19          CAT29
CAT10         CAT20          CAT30
F5=Display Link Details      F13=Product Catalog Relationships
    
```

To add item detail information

From the Product Catalog Management menu (G41900), choose Catalog Detail Information.

1. Inquire on the item. The Branch/Plant is a required field when using stocking items.
2. Change the action to A and complete the following fields:
 - Effective Dates: From and To
 - Display
 - Status
3. Press Enter to add the record.

Catalog Detail Information form (P41903) Fields

Field	Explanation
Effective Dates: From:	The date when an address, item, transaction, or table becomes active, or the date from when you want transactions to appear. The way that the system uses this field depends on the program. For example, the date that you enter in this field might indicate when a change of address becomes effective; or it could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, and so on.
Effective Dates: To:	The date when the item, transaction, or table becomes inactive or through which you want transactions to appear. This field is used generically throughout the system. It could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.
Display	<p>This field is used to determine what description is displayed in the J Walk Product Catalog. The valid data dictionary values are Blank, '1' and '2'. The details for these options are explained below.</p> <p>Blank- Display the Item Master Description.</p> <p>'1' - Display the Long Description setup in the Links Video (P41903A).</p> <p>'2' - Display the Network Item Description Document.</p>
Primary	This data dictionary element is used to determine whether a catalog is a primary catalog. When a catalog has been flagged as a primary catalog it will initially be displayed when a user enters into the Self-Service Product Catalog form.
Status	<p>This data dictionary element is used to store the status of a Catalog. There are three valid status values:</p> <p>A = Active</p> <p>I = Inactive</p> <p>O = Obsolete</p>
Links: Press F5 on link below to view detail	This data dictionary element is used to store a composite key value that will allow link information to be accessed for any item picture that can be used in the Product Catalog.
Picture Key	
Links: Press F5 on link below to view detail	This data dictionary element is used to store a composite key value that will allow link information to be accessed for a Word Document, which would hold an item description that can be used in the Product Catalog.
Network Desc	

Field	Explanation
Links: Press F5 on link below to view detail Long Desc	This data dictionary element is used to store a composite key value that will allow link information to be accessed for a long item description that can be used in the Product Catalog.
Links: Press F5 on link below to view detail Other 1 Other 2 Other 3	This data dictionary element is used to store a composite key value that will allow link information to be accessed for any other related item information that can be used in the Product Catalog.
Catalog Category Codes: CAT1... CAT30	Future use

Catalog Detail Information Form (P41903) Function Keys Available

Function	PC Keyboard	AS/400 Keyboard	Explanation
Display Link Details	F5		Accesses the Product Catalog Links (P41903A) form.
Product Catalog Relationships	F13		Accesses the Product Catalog Relationship (P41904) form.

What You Should Know

The Catalog detail record must exist before any links can be added to an item or catalog.

To add a link to an item or catalog

The catalog detail record is mandatory only for the primary catalog. To make use of any link, a catalog detail record must exist for the item or catalog. One or all links can be setup for each Catalog Detail record.

From the Catalog Detail Information form:

1. Inquire on an item or catalog. When inquiring on a stocking item the Branch/Plant is a required field.
2. Use the Tab key to move the cursor to the field of any link item.
3. Press F5. The Product Catalog Links form displays.

Field	Explanation
Document Extension	Allows you to select one of the following extensions: *** Free Form Text DOC Link Type Word Doc GIF Link Type GIF Picture JPG Link Type JPG Picture PDF Link Portable Document Format URL Link Type URL XLS Link Type Excel Doc
Body of screen	On the underlined lines, type the information based on the document extension selected.

Product Catalog Links Form (P41903A) Function Keys Available

Function	PC Keyboard	AS/400 Keyboard	Explanation
User Info	F6		Displays the detail area for more detailed information on the user.
Ins	F8		Insert information.
Del	F9		Delete information.
Models	F15		Displays the detail area for the Text Model Selection.

To establish a catalog relationship

This procedure is essential because the system uses this data to determine the items to be displayed when you access a catalog. The following procedure creates the relationship records by connecting the items with the catalog. The relationship records create the actual Product Catalog.

The header video fields allow the user to specify criteria that determines what information is displayed. Except for Catalog, a wildcard (*) is allowed for all header fields. Use the wildcard to display all values, or type in particular values to narrow the selection of which relationships are displayed.

From the Product Catalog Management menu (G41900), choose Catalog Relationship Maint form (P41904).

example) for the Child Item Number. Ensure to change the Action Code to A or C in the header section.

- When you type in detail effective dates, keep in mind that customers will only be able to view catalogs and items which fall within the effective date range and which are at an active (A) status.

Catalog Relationship Maint Form (P41904) Fields

Field	Explanation
Action Code	<p>A code that indicates the activity you want to perform. Valid codes are:</p> <p>A Add</p> <p>C Change</p> <p>D Delete</p> <p>I Inquire</p> <p>. End the program</p> <p>Blank Clear the screen</p> <p>If you enter a code that is not active, the system highlights the code and no action occurs.</p> <p>Note: Depending on how your company has set up action code security, you may not be authorized to use all action codes.</p>
Branch/Plant	The Business Unit name of the Branch/Plant.
Parent Item Number	This data dictionary element is used to store an Item Number. The item number is used by the Product Catalog Applications to resemble a Parent Item Number when relating items to a Catalog.
Child Item Number	This data dictionary element is used to store an Item Number. The item number is used by the Product Catalog Applications to resemble a Child Item Number when relating items to a Catalog.
Effective Date To	The date when the item, transaction, or table becomes inactive or through which you want transactions to appear. This field is used generically throughout the system. It could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or whatever is appropriate.

Field	Explanation
Effective Date From	The date when an address, item, transaction, or table becomes active, or the date from when you want transactions to appear. The way that the system uses this field depends on the program. For example, the date that you enter in this field might indicate when a change of address becomes effective; or it could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, and so on.
Status	This data dictionary element is used to store the status of a Catalog. There are three valid status values: A = Active I = Inactive O = Obsolete
Catalog	This data dictionary element is used to store the status of a Catalog. There are three valid status values: A = Active I = Inactive O = Obsolete
Op	In World software, selection exit codes are options and function keys that are used to perform a specific function for a selected line or form of data. The most commonly used selection exits for each program are displayed in highlighted text at the bottom of the form. To display all available selection exits, press F24. Press F1 in the Option field to display all available Options for the program.

Catalog Relationship Maint Form (P41904) Function Keys Available

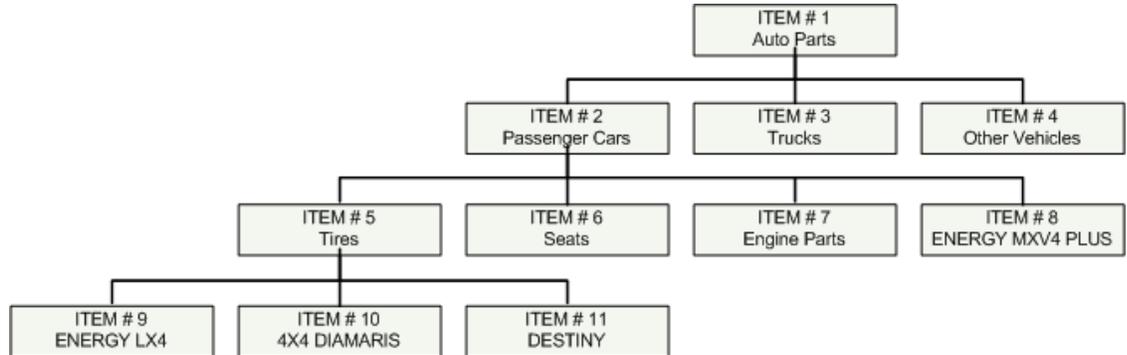
Function	PC Keyboard	AS/400 Keyboard	Explanation
Item Master	F13		
Item Branch/Plant	F14		
More Keys	F24		

Product Catalog Example

The following is an example on how to create a Product Catalog.

- In the following example, the gray squares from the graphic just below, need to be setup in the Item Master Information form (P4101).

Company ABC Product Catalog



Note: Catalogs are setup with a unique Stocking Type value of 4, which designates them as a catalog and allows programs to differentiate between actual items and the catalogs.

- Enter Catalog specific information through the Catalog Detail Information form (P41903).

- Item # 1 Auto Parts

New Catalog Name

Highest level and will not be used anywhere else.

- Item # 2 Passenger Cars

New Catalog Name

In this case, Catalog Category Codes will be used (CAT1=PAS)

- Item # 5 Tires

New Catalog Name

In this case, Catalog Category Codes will be used (CAT1=PTR)

- Item # 8 (ENERGY MXV4 PLUS) and Item # 9 (ENERGY LX4)

Actual stock items that already exist in Item Master Information and Item Branch/Plant Information files

In this case, Item Master Information Category Codes will be used (CAT1=TIR)

- Item # 10 is a new Catalog Name. Use Catalog Category Code (CAT1 = DIA)

Items #1-Auto Parts, #2-Passenger Cars, #5-Tires, and #10-4X4 DIAMARIS; are actually Catalog Names. They need to be setup with the special Stocking Type 4 in the Item Master Information form (P4101) and/or Item Branch/Plant form (P41026). There is no need to do any new setup for Items #8 ENERGY MXV4 PLUS or #9 ENERGY LX4.

- The following table is an example of the relationship records that need to be created for the left column of the Auto Parts Catalog.

Parent Entity	Child Entity
Auto Parts	Passenger Cars
Passenger Cars	Tires
Tires	ENERGY MXV4 PLUS
Tires	ENERGY LX4
Tires	4X4 DIAMARIS
Tires	DESTINY

- The next step is to create the relationship records. Keep in mind that the Product Catalog is based on these relationship records.
Each column on the table above represents a set of data from the Product Catalog relationship file.
- After you create the relationship records, you will have a new catalog to display to customers. This catalog can be updated in real-time through the Catalog Relationship Maint form (P41904).

Accessing a Product Catalog

Product Catalogs are accessed through Self-Service J Walk applications.

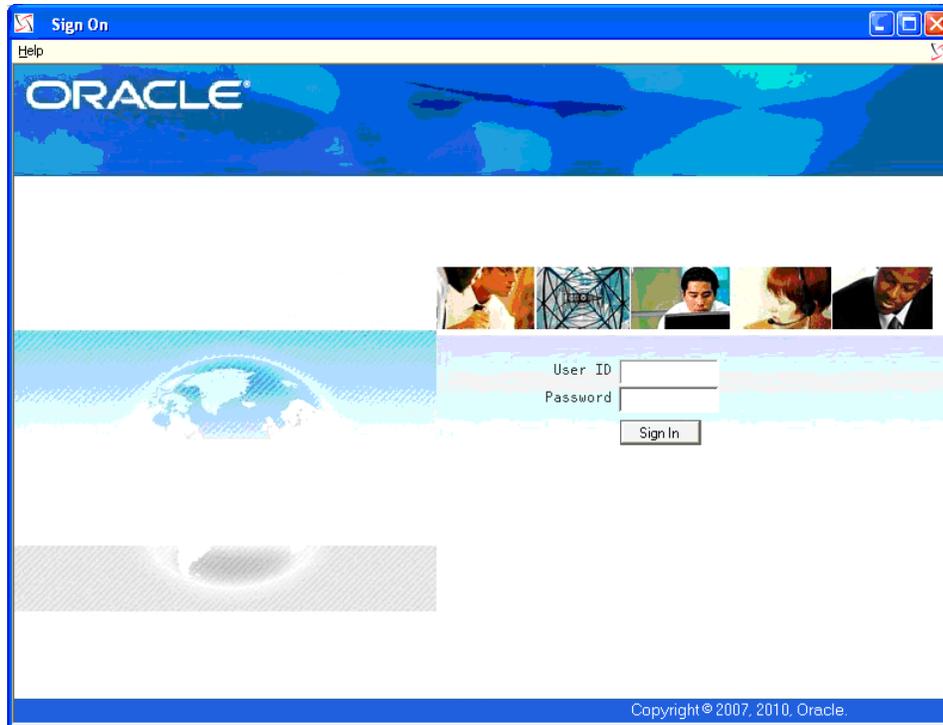
Note: Product Catalog is available from Customer Self-Service on the Sales Order form, the Sold To will default in and the user is allowed to choose an address number for the Ship To.

The following is an example on how to access, view, and order from a Product Catalog.

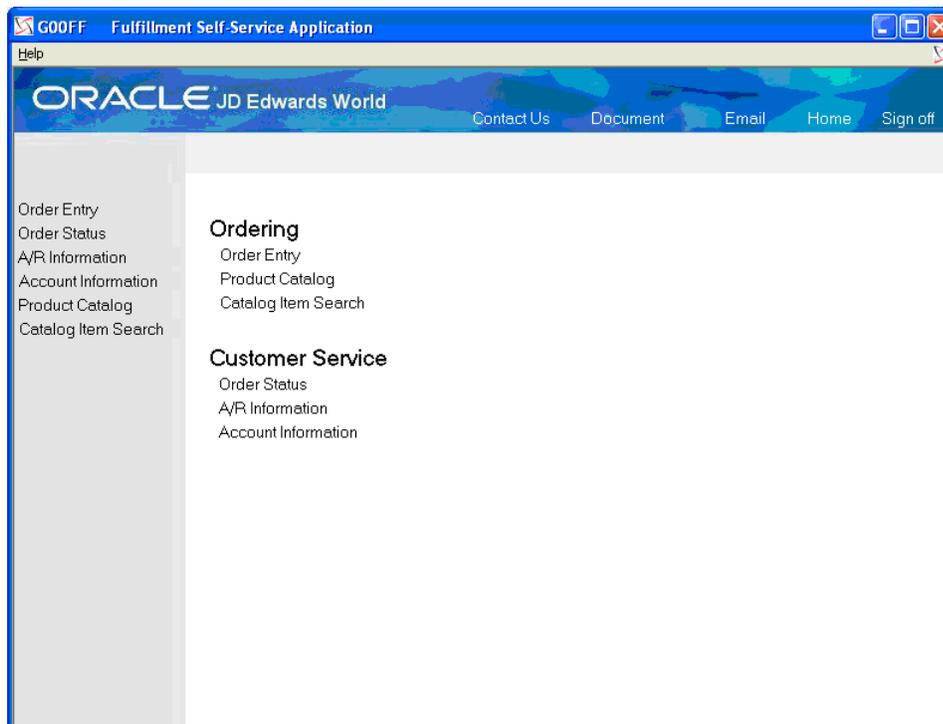
To access, view, and order from a Product Catalog

From the Master Self-Service SIGNON form:

1. Type your User ID and Password.

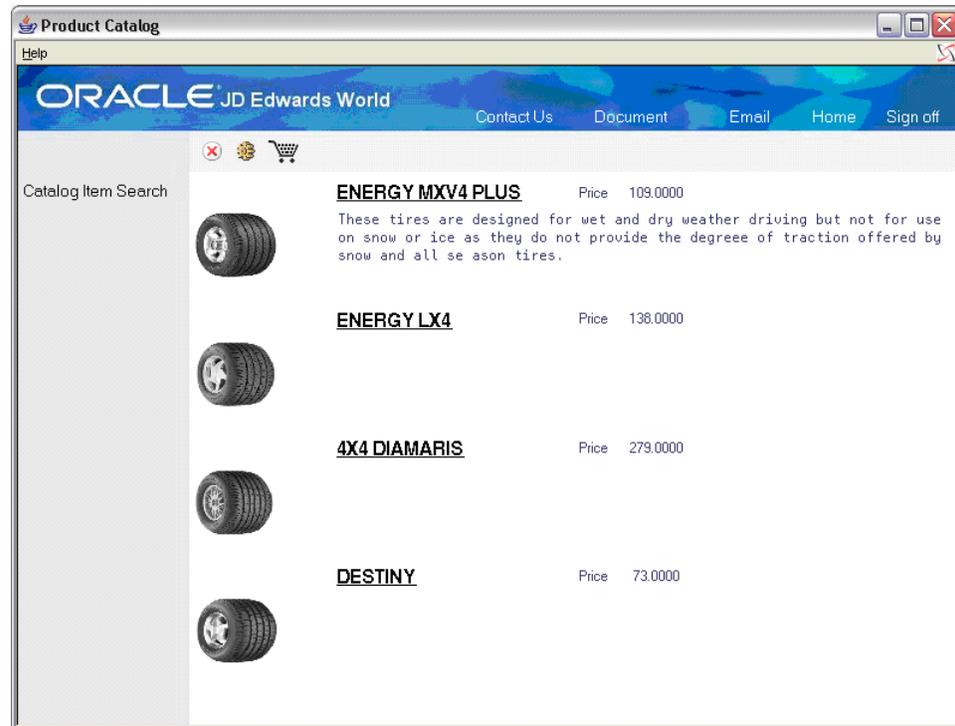


2. Click Sign In.
3. From Customer Self-Service form G00FF, choose Product Catalog.



4. The Product Catalog form displays.

Based on catalog items previously setup, the form might display a graphic, name of the item, price, and a description of the item.



5. On the example above, when you click the item 'ENERGY MXV4 PLUS', the Sales Order Entry form displays. The form displays detailed information on the item and allows you to add the item to the Shopping Cart and either Check Out now or continue looking through the catalog and add more items to the shopping cart.

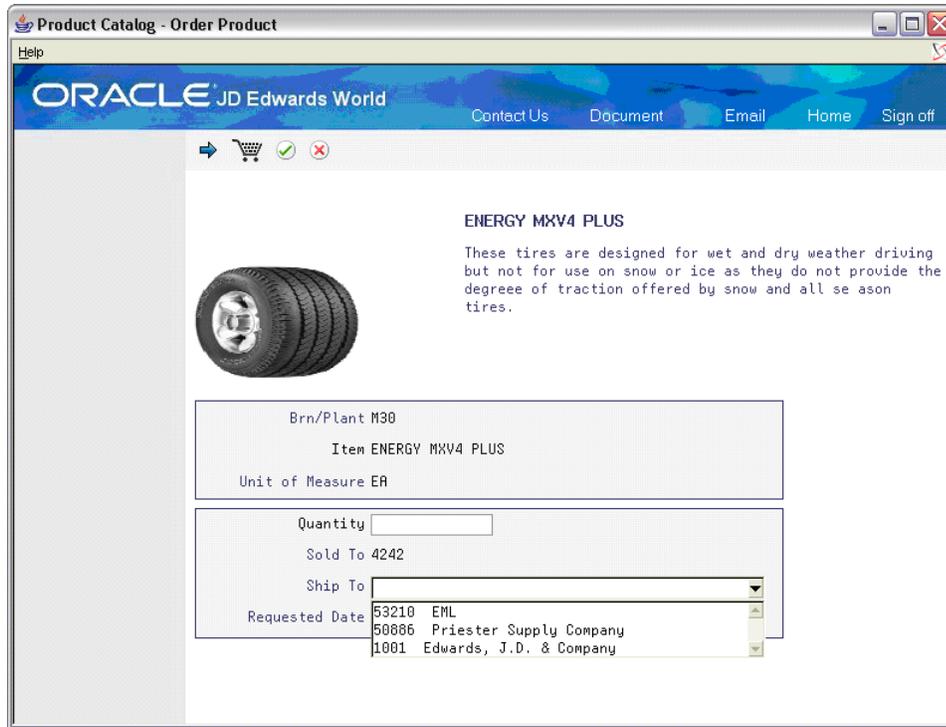
To add the item to the Shopping Cart, enter the Quantity, Sold To, Ship To, and Requested Date. The Sold To and Ship To codes inform the system who requested the item and where to deliver the item (these codes can be different, depending on your delivery preferences).

Continue Shopping creates an order of the chosen item and returns to the Product Catalog form.

View Shopping Cart creates an order of the chosen item and displays the Sales Order Entry form with detailed information on all items ordered thus far.

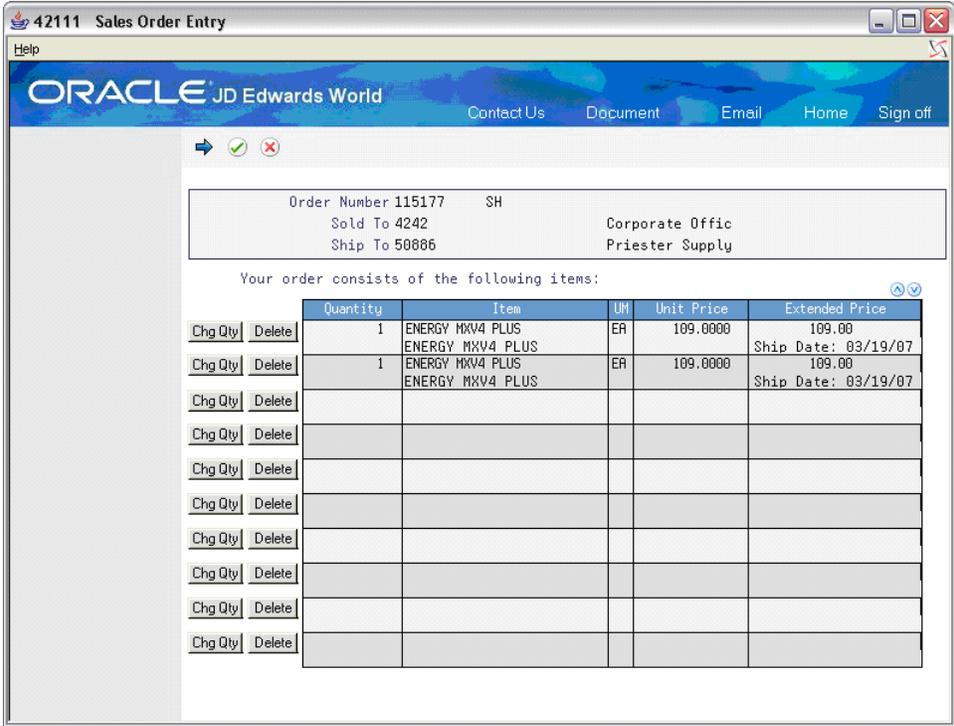
Check Out opens Check Out form and displays detailed information on the current order.

Exit without Ordering will close out of the order without ordering this new item and return to the Product Catalog form.



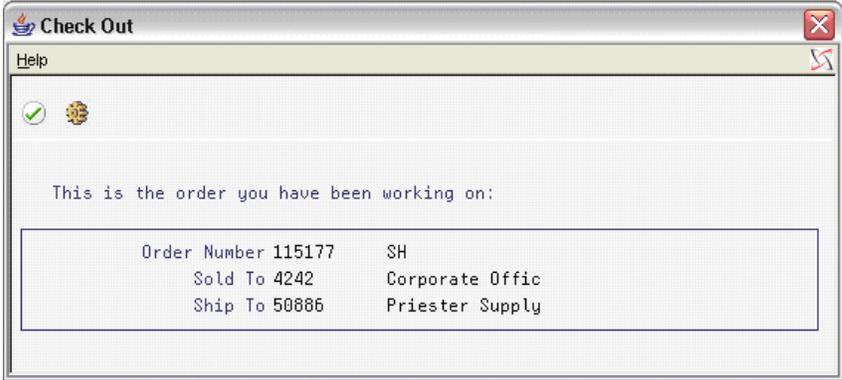
Note: If you click Continue Shopping, the system adds the chosen item to the current order and returns to the Product Catalog form.

- Click View Shopping Cart to add this chosen item to this order and displays the Sales Order Entry form. From this form, you can change the quantities of the items ordered, delete items ordered, check out the entire order, or cancel the order.



7. If you click Check Out, the Check Out form displays. This form displays the Order Number, Sold To code, and Ship To code.

From this form, you can either Return to Order or Check Out to access the Online Invoice form.



8. When you click Check Out from any of the forms where the option is available, the following Online Invoice form displays. This form displays detailed information on all the items you ordered, as well as the Order Total, Invoice Total, and Tax information.

From this form, you can Continue Shopping, View Shopping Cart items and make changes if necessary, or click Finished and the system takes you back to the Customer Self-Service form.

42230 Online Invoice

Help

ORACLE JD Edwards World

Contact Us Document Email Home Sign off

Order Number 115177 SH
 Sold To 4242 Corporate Office Systems Company
 Ship To 50886 Priester Supply Company

Your order consists of the following items:

Description	Order	UM	Quantity	Extended Price	T
ENERGY MXV4 PLUS	03/19/07	EA	1	109.00	Y
ENERGY MXV4 PLUS	03/19/07	EA	1	109.00	Y

Taxable Amount * Tax

Order Total 218.00
 Invoice Total 218.00

9. If you click Return to Order from the Check Out or Cancel Order form, the system takes you back to the Sales Order Entry form.

If you click Cancel Order from the Sales Order Entry form, the following form displays.

Cancel Order

Help

This is the order you have been working on. To Cancel this order, click on Cancel Order. Otherwise, click on Return to Order.

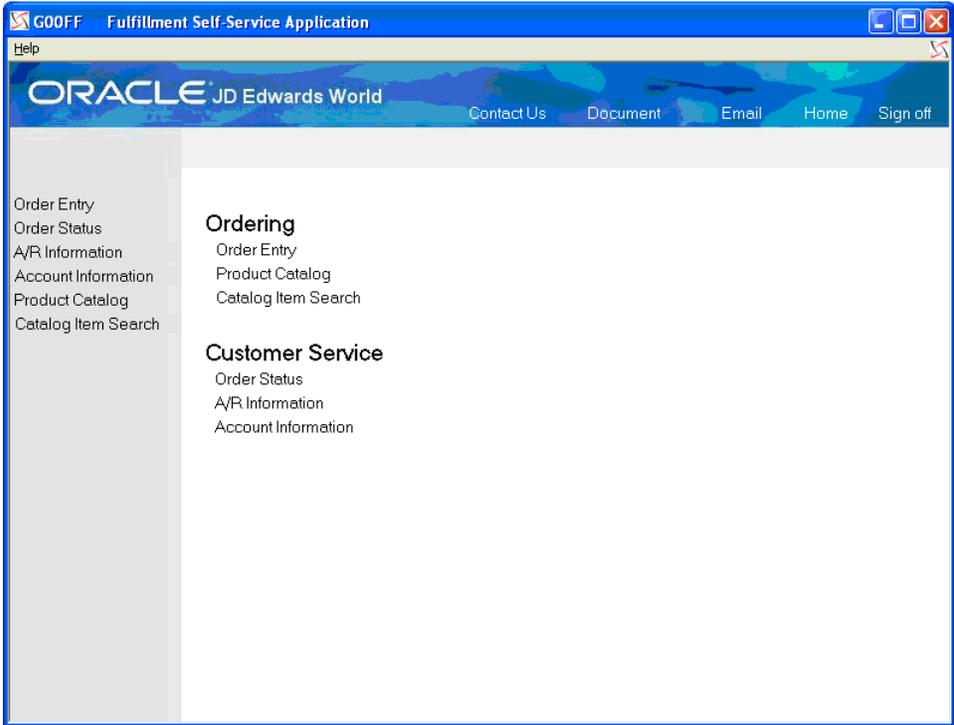
Order Number 115177 SH
 Sold To 4242 Corporate Office
 Ship To 50886 Priester Supply

To search for an item in the Product Catalog

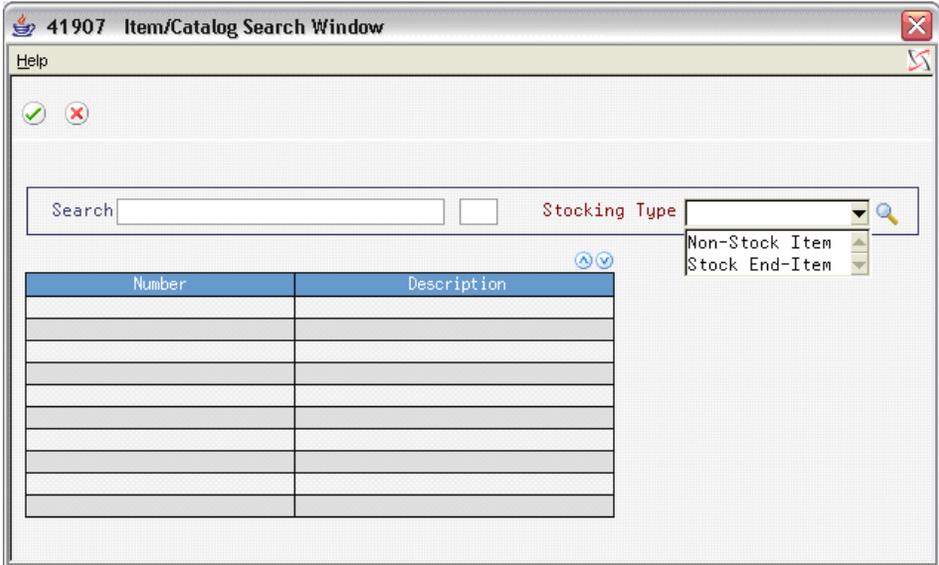
From the Master Self-Service SIGNON form:

1. Enter your Customer ID and Password.
2. Press Enter.

3. From Customer form, choose Catalog Item Search.

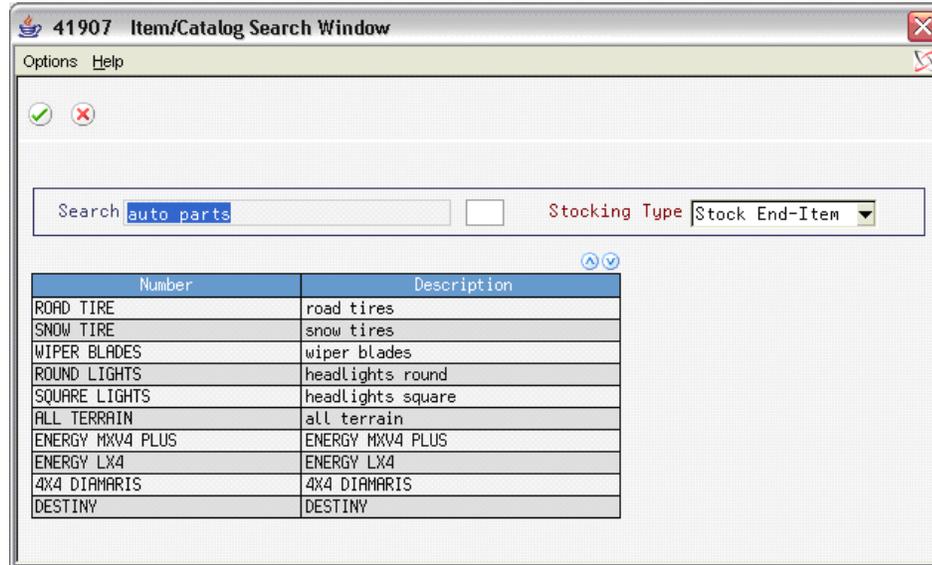


4. The Item/Catalog Search Window displays. From this form, you can type the item or keyword and the Stocking Type you are looking for in the catalog.



5. For example, type the keyword "auto parts" and choose "Stock End-Item" for the Stocking Type by clicking the down arrow on the Stocking Type value and press Enter. The following results display. Double-click the "ENERGY MXV4

PLUS” line. The system takes you to the Product Catalog using the “ENERGY MXV4 PLUS” item as the starting point.



Program Specification Information

Product Catalog Detail Information Program (P41903)

Processing Options

Processing Options	Explanation
<p>DEFAULT VALUES:</p> <p>1. Beginning Effective Date A blank value will result in no default beginning date being loaded</p> <p>2. End Effective Date A blank value will result in no default end date being loaded</p>	<p>The first two processing options are default effective dates. The user has the option of filling in these two processing options dates or leaving them blank.</p> <p>When the user is entering product catalog detail file records through the P41903 program, certain rules are followed for populating the date range. If the user types in a valid date, that date will be used. If the user leaves one of the effective dates blank on an add or blanks one of the effective dates on a change, and if the first two processing options do contain valid, non-blank dates, then the processing option date will default in. If the user adds or changes a record, if the entry date or dates are blank, and if the first two processing options have blank values, then today's date will default into the effective start date and today's date plus 5 years will default into the effective ending date.</p>

Processing Options	Explanation
<p>PROCESS CONTROL:</p> <p>Enter the Link Display Text for the 6 Links:</p> <p>3. Picture ID:</p> <p>4. Network Description:</p> <p>5. Long Description ID:</p> <p>6. Other ID 1:</p> <p>7. Other ID 2:</p> <p>8. Other ID 3:</p>	<p>These six processing options are use to specify default values for the Link Display Text which appears in the header section of the V41903A form. If left blank, then generic default values are used to populate the Link Display Text field in the V41903A form. The user does have the capability to type over the text in the V41903A form in order to specify a desired value.</p>
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version for each program:</p> <p>If left blank, ZJDE0001 will be used.</p> <p>9. Product Catalog Relationship Maintenance (P41904)</p>	<p>This DREAM Writer Version processing option allows the user to specify which P41904 version will be used when P41904 is called from the P41903 program.</p>

Troubleshooting

There are a number of errors that might be issued by the P41903 program. Most of these errors are simple generic errors issued due to an attempt to enter an invalid value.

The following are some possible error messages and an explanation of their cause:

Error Message	Title	Description
0025	Data Dictionary Values	<p>CAUSE . . . The value entered in this field does not match any of the valid values specified in the Data Dictionary.</p> <p>RESOLUTION. . Enter a valid value or place the cursor in the field in error and press 'F1' to display the valid values for this field.</p>

Error Message	Title	Description
0026	Not Authorized to this Record	<p>CAUSE . . . Business Unit security prohibits you from attempting to add, change, delete, or inquire into the specified record. You are not authorized to the record.</p> <p>RESOLUTION. . Obtain authority to the business unit of the record you are attempting to use.</p> <p>Additional Explanation: Have your security administrator go to option 5 on menu G94 to check or make any necessary changes to Business Unit Security for your user profile.</p>
0027	User Defined Code Error	<p>CAUSE . . . The entered code was not found in the User Defined Codes.</p> <p>RESOLUTION. . Enter a valid code or place the cursor in the field in error and press 'F1' to display the valid values for the field.</p>
565A	Invalid Function Key	<p>CAUSE. . . . The F5 function key has been pressed on an invalid field.</p> <p>RESOLUTION. . This function key can only be depressed when the cursor is over one of the six link fields on the video.</p> <p>Additional Explanation: The V41903 form is cursor sensitive and the F5 key is used to access the V41903A form when the cursor is placed upon one of the "links" headings on the V41903 form.</p>

Error Message	Title	Description
569B	Deletion of catalog records	<p>CAUSE. . . . Warning - You are about to delete a catalog record. All corresponding link records on the F41905 and F41906 will be deleted also.</p> <p>RESOLUTION. . .Press Enter to verify delete. Otherwise, change the action code and re-inquire.</p> <p>Additional Explanation: This is a warning message, which is shown to make sure that the user understands that they are about to delete records.</p>
569A	No corresponding description	<p>CAUSE. . . . There is no corresponding description for the display description entry.</p> <p>RESOLUTION. . .This is a warning message only.</p> <p>Blank indicates that the item master description is used.</p> <p>For a display description of '1' a long description is needed (Record on the F00163).</p> <p>For a display of '2' a network description is needed (Record on the F00163).</p> <p>Additional Explanation: This is a warning message to verify from the user that they do not want to specify either the long description or network ID link to specify what description to display for the catalog entry.</p>

Error Message	Title	Description
526C	Processing Option Invalid	<p>CAUSE. . . . The Data Range that was entered for the From and To Effective Dates is not valid.</p> <p>RESOLUTION. . .Clear the effective data processing options or enter in a valid data range.</p> <p>Additional Explanation: This error is issued when the first two processing options for date range are invalid and the program is attempting to use them as defaults.</p>

Product Catalog Relationships Maintenance Program (P41904)

Processing Options

Processing Options	Explanation
1	Enter a value to determine what type of Product Catalog to display. If left blank the Sales Order Catalog will display.
2	Enter a valid value to default Catalog Status. If left blank "Active" status will be used.
DREAM Writer VERSIONS. Enter the version for each program: If left blank, ZJDE0001 will be used.	
3	Item Master Information (P4101)
4	Item Branch Information (P41026)
5	Product Catalog Detail Information (P41903)

Error Messages

Error Message	Title	Description
587A	Invalid Relationship	<p>CAUSE. . . . The data entered for the subfile record will create an invalid relationship record in F41904. If a parent item is entered it must be a catalog. Hence, the Stocking Type should be '4'.</p> <p>RESOLUTION. . . Enter a parent with Stocking Type '4' OR Enter a blank for the parent item.</p>
586A	Invalid Child Item	<p>CAUSE. . . . When the Parent Item is blanks, the Child Item/Catalog Number must contain a 'P' in the Primary Catalog field(QICATP) on the Product Catalog Detail Information file (F41903).</p> <p>RESOLUTION. . . Enter a Parent Item OR Enter a Child Item/Catalog Number which contains a 'P' in the Primary field on the Product Catalog Detail Information file (F41903).</p>
562A	Recursive Relationship	<p>CAUSE An item cannot be the child of itself.</p> <p>RESOLUTION. . . Change either parent or child item, so that they are different.</p>
0267	Item Number Invalid	<p>CAUSE The Item Number entered does not exist in the Basic Item Master (P4101).</p> <p>RESOLUTION. . . Enter a valid Item number or add the Item to the Basic Item Master (P4101).</p>
0294	Item Branch Record does not exist	<p>CAUSE An Item Branch record (F4102) does not exist for this item in the Branch/Plant specified.</p> <p>RESOLUTION. . . Correct the Branch or enter an Item Branch record for this item in Branch Plant Item Information (P41026).</p>
4003	Blanks Invalid	<p>CAUSE The data field being processed does not allow blanks or zeros to be entered.</p> <p>RESOLUTION. . . Enter a non-blank or non-zero value.</p>

Product Catalog Display Program (P41905)

Processing Options

Processing Options	Explanation
1	Enter a Product Catalog style. If left blank, Sales Order Catalog style will be used.
CATALOG BRANCH PLANT	
2	Enter the Catalog Branch/Plant. _____ OR Enter 1 to use the USERID _____ Branch/Plant default Note: leave blank if the Catalog Branch/Plant setup is blank
DREAM WRITER VERSIONS:	
Enter the version for each program:	
If left blank, ZJDE0001 will be used.	
3	Item Master Information (P4101) _____
4	Item Branch Information (P41026) _____
5	Order Entry - Single Line (P4201A) ZJDESS004
6	Order Entry - Page Mode(P4211) ZJDESS006

Error Messages

Error Message	Title	Description
579A	No Relationship Records	CAUSE. . . . The item selected does not have any related item or catalog records associated with it. RESOLUTION. . . A relationship record should be setup with the item being selected as a Parent Entity and associated items as Child Entities.

Item Master Information Program (P4101)

Processing Options Changes/Additions

Add the new processing option after the current list of processing options changes listed below.

DREAM Writer versions:

Enter the version to be used for each program. If left blank, ZJDE0001 is used

8. Item Availability (P41202)

9. Item Branch (P41026)

Processing Options	Explanation
Please enter the following program versions:	
10	Product Catalog Detail Information (P41903)

Item Branch Information Program (P41026)

Processing Options Changes/Additions

Add the new processing option after the current list of processing options changes listed below.

DREAM WRITER VERSIONS:

3. Summary Availability (P41202)

4. Item / Location Information (P41024)

5. Test / Specification Revisions (P3710)

Processing Options	Explanation
6	Product Catalog Detail Information (P41903)

Product Catalog Search Program (P41907)

Processing Options

Processing Options	Explanation
1	Enter a '1' to display all catalogs and items that exist in the Item Master File (F4101). Leave blanks to only display catalogs and items with a valid Product Catalog Relationship record.
2	Enter the Product Catalog Style. DREAM WRITER VERSIONS: Enter the version for each program: If left blank, ZJDE0001 will be used.
3	Product Catalog Display Video (P41905) ZJDESS001

Product Catalog for World Self-Service

Product Catalog Relationship Generator

General Purpose

The Product Catalog Relationship Generator functionality allows you to dynamically generate and delete large numbers of product catalog relationship records in a short time. Product Catalog Relationship Generator uses batch processing to achieve a great level of productivity and in essence, its functionality is a batch version of the Product Catalog Relationship Maintenance process (P41904).

How to Use the Product Catalog Relationship Generator

Prior to generating new catalog relationship records using the generator program (P41906), you first must have the top-level catalogs, also known as primary catalogs, already set up as records in the product catalog relationship file. These records are distinguished by having a blank parent item and a child item with a description, which is the name of a product catalog. A primary catalog, which has been set up in the catalog detail information video (V41903), is also indicated by having a value of "P" in the "primary catalog" code. Use the online catalog relationship maintenance video (V41904) to set up the initial primary catalog relationship record (with a blank parent item). Once the primary catalog relationship record or records are set up, you

are ready to move on to setting up to generate catalog relationship records for levels below the primary catalog level.

The following procedure generates a batch of lower level catalog relationship records:

1. Specify the four DREAM Writers used for the batch process
2. Specify the values for the processing options for the main P41906 DREAM Writer
3. Execute the program to generate the catalog relationship records
4. Review the reports generated to determine whether errors occurred which need to be addressed

1. Specifying the Four DREAM Writers for P41906

The catalog relationship batch generator program (P41906) has a main DREAM Writer, P41906, and three record selection DREAM Writers: P41906A, P41906B, and P41906C.

P41906 DREAM Writer: Is the main DREAM Writer for P41906. To ensure proper processing, it is important to verify that you complete the processing options for this DREAM Writer. For instruction on filling out these processing options, refer to the next section number 2.

P41906A DREAM Writer: The purpose of this DREAM Writer is to select which records from the Item Master File (F4101) are to be used to create child relationships. Only modify the Data Selection function of this DREAM Writer. You can use any of the fields in F4101 as criteria for data selection. The user decides which F4101 fields must be used and what the selection rules are in this DREAM Writer.

P41906B DREAM Writer: The purpose of this DREAM Writer is to select which records from the Item/Branch Master File (F4102) are to be used to create child relationships. Only modify the Data Selection function of this DREAM Writer. You can use any of the fields in F4102 as criteria for data selection. The user decides which F4102 fields must be used and what the selection rules are in this DREAM Writer.

P41906C DREAM Writer: The purpose of this DREAM Writer is to select which records from the Product Catalog Detail Master File (F41903) are to be used to create child relationships. Only modify the Data Selection function of this DREAM Writer. You can use any of the fields in F41903 as criteria for data selection. However, when deciding which fields to use from the F41903 file, most users will opt for using the Catalog Category Code fields for data selection. The user decides which F41903 fields must be used and what the selection rules are in this DREAM Writer.

2. Specifying the Processing Options for the Main P41906 DREAM Writer

For the P41906 processing options, thirteen processing options can be organized into nine groups. The following explains each group:

Processing Option 1:

ITEM/CATALOG SELECTION:

1. Enter in the Parent Number (Short Item Number) to be used to create the Product Catalog. (Required)

In this processing option, specify the short item number of the parent item for the relationship records you want to generate for this batch. The value specified in this processing option must be a valid short item number that exists in the Item Master File (F4101); otherwise, an error will be issued when an attempt is made to execute the program.

Processing Options 2, 3, and 4:

DREAM WRITER VERSIONS:

Enter the version for each program:

No default versions will be used.

2. This version will create Child Items from the Item Master File (F4101) based on the selection criteria specified. The Version ID is P41906A.
3. This version will create Child Items from the Item Branch File (F4102) based on the selection criteria specified. The Version ID is P41906B.
4. This version will create Child Items from the Product Catalog Detail Information File (F41903) based on the selection criteria specified. The Version ID is P41906C.

These three processing options are used to specify which DREAM Writer versions will be used to select the child items for the catalog relationship records. Option 2 is the version for selecting items from the Item Master file (F4101), option 3 is the version for selecting items from the Item/Branch master file (F4102), and option 4 is the version for selecting items from the Product Catalog Detail file (F41903). It is permissible to leave any of these options blank if it is desired that records not be selected from a particular file. However, keep in mind that if all three of these DREAM Writer versions are blank, then no catalog relationship records will be generated. Typically, one, two, or all three of these DREAM Writer versions will be non-blank.

Processing Option 5:

5. Leave blank if the item number can exist in any of the DREAM Writer Versions to be selected for the catalog. Enter '1' if the item number must exist in all of the DREAM Writer Versions to be selected for the catalog.

This processing option is used in conjunction with the three selection DREAM Writer versions in selecting items and will only come into play if more than one of the selection DREAM Writer versions are non-blank. The purpose of this processing option is to specify an "OR" or an "AND" relationship for item selection. A blank in

this processing option signifies an “OR” relationship. A “1” in this processing option signifies an “AND” relationship. For example, lets assume that DREAM Writer versions P41906A and P41906B are specified and that only certain records from F4101 and F4102 will be accessed due to data selection criteria. If item A is read from the F4101 file, if item A is not read from the F4102 file, and if this processing option is set to BLANK, then a relationship record will be created for item A in the Product Catalog Item Relationship (F41904) file. If item A is read from the F4101 file, if item A is not read from the F4102 file, and if this processing option is set to “1”, then a relationship record Will Not be created for item A in the Product Catalog Item Relationship (F41904) file because item A was not read from both the F4101 and the F4102 files.

Processing Options 6 and 7:

BRANCH PLANT SELECTION GENERATION:

Specify the Branch Plant default on the Product Catalog Relationship records.

6. Enter the Branch Plant to be assigned to the Product Catalog records being generated.

OR:

7. Enter '1' to generate a Product Catalog record using the Branch Plant from the Item Branch File (F4102) or Product Catalog Detail File (F41903) record selected, or enter '2' if no Branch Plant will be assigned to the catalog being generated.

One and only one of these two processing options will be used for a single batch run of the generation program. Therefore, one of these two processing options must be blank and one of these two processing options must be non-blank. If both processing options are non-blank or if both processing options are blank then an error is issued. If processing option 6 is specified with a non-blank value, that value will be validated to ensure that it is a valid business unit. If processing options 7 is specified with a value other than blank, “1”, or “2” an error will be issued. If processing option 6 is used to specify a particular business unit, then that business unit will be used to populate the business unit for all new records being created for the product catalog relationship file for a particular batch execution. If “1” is specified in processing option 7 for a particular run of the batch generation program, then all records written to the product catalog relationship file with items selected from the item branch file or the product catalog detail file will have the business unit populated from the item branch record or product catalog detail record which was read. If “2” is specified in processing option 7 for a particular run of the batch generation program, then all records written to the product catalog relationship file for that batch will have a value of blanks for the business unit.

Processing Options 8 and 9:

CLEAR EXISTING CATALOG VALUES:

8. Enter '1' to clear Catalog Relationship Records for all Branch Plants. Enter 2 to clear Catalog Relationship Records with no Branch Plant.

9. Enter the Branch Plant to be cleared.

Note: Existing Catalog Relationship Records will be cleared based on the Parent & Catalog Style specified above.

If product catalog relationship records are to be deleted, only records with a parent item identical to the item specified in processing option 1 are eligible to be deleted.

Only one of the two processing options 8 and 9 can be specified. If both of these processing options are specified, then an error is issued. If processing option 8 has a value other than blank, "1", or "2", then the batch generation program will assume that processing option 8 should have a value of blank. If processing option 9 has a non-blank value, that value is edited to ensure that it is a valid business unit and for business unit security.

It is permissible to both delete records and generate new records in the same batch run. If records are being deleted and created within the same batch when the batch is processed, the record deletion occurs before the creation of new records.

For product catalog relationship record deletion, there are three scenarios which can be employed; 1) set processing option 8 to "1" to delete records for all business units, 2) set processing option 8 to "2" to delete records with blank business units, and 3) specify a specific business unit in processing option 9 to delete records with that business unit.

If processing option 8 is set to a "1", then for a given product catalog relationship record (F41904) to be deleted, certain conditions must be true. The product catalog relationship record must have the same parent item as specified in processing option 1. The product catalog relationship record must have the same catalog style as specified in processing option 11. The product catalog relationship record must have a non-blank business unit. Finally, the product catalog relationship record must have a business unit, which will pass muster with business unit security.

If processing option 8 is set to a "2", then for a given product catalog relationship record (F41904) to be deleted, certain conditions must be true. The product catalog relationship record must have the same parent item as specified in processing option 1. The product catalog relationship record must have the same catalog style as specified in processing option 11. Finally, the product catalog relationship record must have a blank business unit.

If processing option 9 has a business unit specified, certain conditions are required for the deletion of product catalog relationship records (F41904). The product catalog relationship record must have the same parent item as specified in processing option 1. The product catalog relationship record must have the same catalog style as specified in processing option 11. Finally, the product catalog relationship record must have the same business unit as the business unit specified in processing option 9.

Processing Option 10.

10. Enter a '1' to print the Product Catalog Relationship Generation Report.

Enter a "1" into processing option 10 if you desire to produce a batch report which is a list of the product catalog relationship file records created by the batch run. The

report lists the parent item and description, the child item and description, the business unit, the from/to dates, the record status, and the catalog style.

Processing Option 11.

- 11.** Enter a value to determine what type of Product Catalog to process. The default value will be blank which will in turn create the Sales Order Catalog.

Enter the catalog style in processing option 11. Product catalog relationship records created during the batch generation will have the catalog style populated with this value. If records are being deleted, the catalog style in the product catalog relationship file is compared to the value in processing option 11 and only the records with catalog styles, which are identical to processing option 11, are deleted.

Processing Option 12.

- 12.** Enter the default effective dates. From and To, for the Product Catalog records that are going to be generated.

Beginning Effective Date

Ending Effective Date

Processing Option 12 is used to enter the date range during which the product catalog relationship records will be effective. The effective dates are edited in the processing options at the time that the user types them in and presses ENTER. When the batch generator is submitted for execution, the date range is edited to verify that the beginning effective date is not greater than the ending effective date.

The two dates in processing option 12 are used to populate the effective dates for new product catalog relationship file records being created by the batch generation program (P41906).

Processing Option 13.

- 13.** Enter the default status for the Product Catalog records that are going to be generated. The default value will be Active 'A'.

If the catalog status entered in processing option 13 is not "A" (Active), "I" (Inactive), or "O" (Obsolete), then it is set to "A" as the default.

This processing option is used to populate catalog status in new product catalog relationship file records created by the batch generator.

3. Execute the Program

Once you have set up the selection DREAM Writer versions and set the processing options in the main DREAM Writer for P41906, you are ready to execute the program. Submit your version of P41906 to batch. This job creates and/or deletes F41904 records according to the criteria you have set up.

4. Review the Reports

After the batch generator (P41906) has executed, review the exception report (R41906A) generated. If the report has any errors listed, evaluate and take the appropriate action.

PRODUCT CATALOG SEARCH

```
41907          Item/Catalog Search Window
Search XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XX Stocking Type. X
0          Number          Description
X XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX
Opt:   I=Catalog          F3=Exit          F24=More Keys
```

The system uses this display file to display a Product Catalog Search program. This display file window allows a customer to search through the various item and catalog records to find a specific entry. In the header area, the user can type in search criteria including description, language preference, and stock type.

Supplier Self-Service Installation and Configuration

Businesses can use the JD Edwards World Self-Service application suite at any time for transactions such as information on orders, receipts, and payments and to respond to requests for quotes.

Self-Service Technology

The Self-Service application suite was designed using the current SEAGULL J Walk technology and templates, which can be altered to fit individual needs. This Web (or server) technology provides you with a Web look while running JD Edwards World, but with greater functionality and ease of use.

Businesses can use the JD Edwards Supplier World Self-Service application suite at any time for transactions such as information on orders, receipts, and payments and to respond to requests for quotes. With minimal setup on your part, the user can work from a remote site. For example, when using Supplier Self-Service, the supplier can view product and account information as well as enter quote responses through the Supplier application system. Examples of the information that the products contain are information on physical inventory, account information, and view responses to quotes.

Setup

This J Walk application is installed automatically when a client uses the Oracle A9.1 Web Enablement Install download. To activate access to this application using a web browser, the administrator who installed this application will need to complete the following tasks.

For a J Walk Server on an iSeries,

1. Start the J Walk Server by typing the following on a command line:
SEAJWK/STRJWKSVR PROFILE(SUPP91)
2. Once the J Walk Server has been started, the URL can be accessed using a web browser and the following path:
http://your_iSeries/jwalk/supp91.html

Note: Ensure you replace the text `your_iSeries` with the name used for your iSeries, as specified during the install.

For a J Walk Server on Windows,

1. From the Windows server, when the J Walk Server is running, the following icon should display on your icon tray at the bottom right-hand corner of your screen:



- If the icon above does not display, start the J Walk Sever by doing the following:
Start\Programs\J Walk Server\Start A9.1 Web Enablement Supplier Server.
2. Once the J Walk Server has been started, the URL can be accessed using a web browser and the following path:

`http://your_Windows_server/supp91.html`

Note: Ensure you replace the text `your_Windows_server` with the name used for your Windows server, as specified during the install.

For the Supplier Self-Service application, you must perform certain setup tasks on the host iSeries before you can use the individual applications. The setup tasks generally involve verifying that the menus, DREAM Writer versions, system constants, and user profiles are set up, and for each application, additional setup considerations might exist.

This section contains the following topics:

- Setting up menus
- Setting up DREAM Writer versions
- Setting up system constants
- Setting up a user profile
- Setting up additional information

Setting up Menus

The Supplier Self-Service application requires the following menus and DREAM Writer versions to be in the environment before the application can be used. The menus and DREAM Writer Versions will have been included in your environment in A91PC00000 and above. The following table describes various codes that are used in the menu descriptions:

S	=	Selection
JE	=	Job to execute
B	=	Batch
H	=	Highlight
OC	=	Option Code
OK	=	Option Key
AO	=	Application Override

See Also

- Menu Design in the Technical Foundations Guide for more information about menu setup and maintenance
- Documentation can also be found on Customer Connection

Menus for Supplier Self-Service

You must verify this menu information for G00VENDS and apply any security needed.

Menu 1: G00VENDS

Field	Value
Menu ID	G00VENDS
Menu Title	Supplier Self-Service – Supplier
Level of Display	4
Menu Class	1

S	Description	JE	B	H	Help Inst Key	OC	OK	Version	AO
01	Enter Purchase Orders	J4311	0	0	P4311	1	P4311	ZJDESS001	43
06	Open Order Inquiry	J430301	0	0	P430301	1	P430301	ZJDESS001	43
10	Supplier Ledger Inquiry	J042003	0	0	P042003	1	P042003	ZJDESS001	43
11	Supplier Payment Inquiry	J042004	0	0	P042004	1	P042004	ZJDESS001	43
13	Address Book	J01051	0	0	P01051	1	P01051	ZJDESS001	43
14	Item Search	J41200	0	0	P41200	1	P41200	ZJDESS001	43
23	Enter Quote Response	J4334	0	0	P4334	1	P4334	ZJDESS001	43
24	Customer Billing Instructions	J4206	0	0	P4206				43

Setting up DREAM Writer Versions

See Also

- DREAM Writer in the Technical Foundation Guide for more information about DREAM Writer setup and maintenance

DREAM Writer Versions for Supplier Self-Service

Use the following table to verify DREAM Writer versions that contain the processing options for each program selection on menu G00VENDS:

DREAM Writer Form	DREAM Writer Title	Copy From Pristine Version	Create New Version
P4311	Order Entry - Inventory	ZJDE0001	ZJDESS001
P430301	Open Purchase Orders - Inventory	ZJDE0001	ZJDESS001
P042003	Supplier Ledger Inquiry	ZJDE0001	ZJDESS001
P042004	Payment Ledger Inquiry	ZJDE0001	ZJDESS001
P01051	Address Book - Phone Number Format	ZJDE0001	ZJDESS001
P41200	Item Search with Word Search	ZJDE0001	ZJDESS001
P4334	Quote Response Entry	ZJDE0001	ZJDESS001

Setting up System Constants

System constants are settings that apply to all branch/plants and determine which functions the system performs. You cannot customize the system constants for individual branch/plants.

To set up system constants

1. From menu G4241, choose Branch/Plant Constants.
2. To access the System Constants window, press F10.
3. In the ECS Control field, enter N.

4. To return to menu G4241, press F3 twice.
5. From menu G4241, choose Default Location & Printers.
6. Enter a branch/plant where the user has authority to place orders.

See Also

- Inventory Management Guide for more information about setting up company constants and about default locations and printers

Setting up a User Profile

After you have identified the user's address book number, you must use that address book number to set up a user profile that limits the user's access to Self-Service application environments. A user profile consists of both an IBM profile and a JD Edwards World profile. The user cannot sign on without a user profile.

In the user profile, you must specify the user ID, password, and preferences, such as language. Within the user profile, you must also specify the appropriate menu so that the user can access only the menus and the respective programs for the applicable environment.

Before You Begin

- Ensure that you have defined the libraries for the Self-Service application that you are working with.

To set up a user profile

1. Using the IBM command CRTUSRPRF, complete the following fields as follows:
 - Special Authority (SPCAUT)
Enter *JOBCTL
 - Group Profile (GRPPRF)
Enter JDE
 - Initial Program (INLPGM)
Enter either J98INIT or J98INITA
 - Job Description (JOBDD)
Enter a job description that can be used with this user profile or enter the name of the USERID being created (This requires you to create a job description first)
2. From the Security Officer menu (G94), choose User Information.
3. Enter the User ID. When you are working with the user ID J98INIT, enter the following in the Library List field:

QTEMP	SECLIB	COMLIB	DTALIB	OBJLIB	QGPL
-------	--------	--------	--------	--------	------

4. In the Initial Menu to Execute field, enter G00VENDS.
5. In the Allow Command Entry (Y/N) field, enter Y.
6. In the Allow Menu Traveling (Y/N) field, enter Y.
7. In the Allow Fast Path (Y/N) field, enter N.
8. In the Employee Address Number (PPAT) field, enter the identification number for the approval review process.
9. When you are working with user ID J98INITA, proceed to menu G944 and choose Library List Revisions.
10. Add an environment with the equivalent libraries:

QTEMP	SECLIB	COMLIB	DTALIB	OBJLIB	QGPL
-------	--------	--------	--------	--------	------

11. Return to the Library List Control menu (G944), choose User Sign on List Revisions, and then add the new environment for the Self-Service application.

See Also

- Technical Foundation Guide for more information about security setup and maintenance
- The white paper, *World Software Security*, which is available on Customer Connection (Product/Software Updates/3385954), for additional security information as well as a software update that you can download.

Setting up Additional Information

For the Supplier Self-Service application, consider the following during setup:

- Set up only one environment, Supplier Self-Service, for the generic user. If you choose to add more than one environment for the generic user, this application will not function properly.
- When signing on, the user must enter either a purchase order number or invoice number and an address book number for the password. A script within this application will then verify whether a valid address book number has been entered, whether a matching purchase order number with the specific address book number is found, or whether a matching invoice number with the specific address book number is found. If any of these conditions fail, the user will not have access to the Supplier Self-Service environment and the menu G00VENDS.
- Set display record limit for P41200. Type UDC on command line. Inquire on System Code 00 and User Defined Codes IO and update the value for P41200 to appropriate number of records for display.

- Use .gif files for images. If you use other types of images, use the J WALK Developer Tool Kit to review and change Image file/ID paths.
- Use Master for picture albums (Master9100.jwp).
- The administrator installing the Supplier SS app, needs to verify that the appropriate text file entry is set accordingly on the MASTER9100.JWM file.

To change the text file entries, use a text editor tool such as MS Notepad or MS WordPad to open the MASTER9100.JWM file, located in the Working Directory in the JWALK.INI file.

For iSeries-i5 Installation:

- The JWALK.INI file is within the IFS under /Your iSeries-i5 Web Server root folder/SEAJWK

For Windows NT-2000-2003 Server and J Walk Client for Windows Installations:

- The JWALK.INI file is within C:\Program Files\SEAGULL\J Walk Server\4.1xxx.x.xxx\

Example paths for location of MASTER9100.JWM:

For iSeries-i5 Installation:

- Your iSeries-i5 Web Server root folder/JWALK/JWALKAPP/SUPP9100APP/

For Windows NT-2000-2003 Server and the J Walk Client for Windows Installations:

- C:\inetpub\wwwroot\ JWALKAPP\SUPP9100APP\

MASTER9100.JWM Text File Entry Updates:

MASTSSURL set to path for the type of install:

- If NT Java Client, http://<PC server name>
- If Native Java Client install, //iSeries machine name

The INSTALL default is WAS. This value only needs to be reset when using an NT Java Client. If Java Client with NT, this value should be changed to NT.

Appendices

Appendix A – Project Files

Employee Project Files

Main Project Files (WV9100*)	Secondary Project Files (SSERM9100*)
WV9100.jwa	SSERM9100.jwa
WV9100.jwd	SSERM9100.jwd
WV9100.jwe	SSERM9100.jwe
WV9100.jwp	SSERM9100.jwp
WV9100.jwi	SSERM9100.jwi
WV9100.jwm	SSERM9100.jwm
WV9100.jwr	SSERM9100.jwr
.gif images	.gif images
.jww files	.jww files
.jws files	.jws files
.jwt files	.jwt files

Customer Project Files

Main Project Files (FULFLL 9100*)	Secondary Project Files (Master 9100*)
FULFLL9100.jwa	Master9100.jwa
FULFLL9100.jwd	Master9100.jwd
FULFLL9100.jwe	Master9100.jwe
	Master9100.jwp
	Master9100.jwi
FULFLL9100.jwm	Master9100.jwm
FULFLL9100.jwr	Master9100.jwr
.gif images	.gif images
.jww files	.jww files
.jws files	.jws files

Main Project Files (FULFLL 9100*)	Secondary Project Files (Master 9100*)
.jwt files	.jwt files

Supplier Self-Service Project Files

Main Project Files (Supp 9100*)	Secondary Project Files (Master 9100*)
Supp9100.jwa	Master9100.jwa
Supp9100.jwd	Master9100.jwd
Supp9100.jwe	Master9100.jwe
	Master9100.jwp
	Master9100.jwi
Supp9100.jwm	Master9100.jwm
Supp9100.jwr	Master9100.jwr
.gif images	.gif images
.jww files	.jww files
.jws files	.jws files
.jwt files	.jwt files

The following is a list of the project files:

- .JWR
Compiled panel file (or package file) that contains all the GUI panels that will be displayed at runtime.
- .JWM
External text file that contains text references that are referenced from compiled application panels.
- .JWX
Translation Table. Stores text strings and their translations.
- .JWC
Control file used to handle .JWR sequencing and automatically update .JWR files based on date stamp.
- .JWA
Stores a list of all the panels, screen connections, objects, text files and translation tables.
- .JWD

Stores the path to the .JWA, .JWE, Picture Album and Smart Build templates, and the runtime options for a project.

- .JWE
Stores all screen identifications, host field definitions and recorded macros.
- .JWP
Stores pictures of all screens extracted by the Collector.
- .JWI
Stores a unique identifier for each picture in the Picture Album. Used to recognize screens during runtime.
- .JWW
Stores the definition of each panel.
- .JWT
Panel Templates. Stores rules and assumptions for building panels.
- .JWS
Screen Templates. Stores changes to screen definitions to be used when building panels.
- Graphics files (.BMP, .ICO, .JPG, .GIF, .WIN)
Graphics used in GUI panels, either referenced individually or as part of a .WIN file. Must include .WIN file if used.

Controlling the Order in which .JWR Files are Accessed

If you have created your own custom .JWR panel files you can use a control file(.JWC) to control the order in which these files are accessed.

If you deploy more than one .JWR panel file, they are accessed in reverse-alphabetical order. For example, if you have three files (apples.JWR, bananas.JWR, and oranges.JWR) in your A91APP directory, Self-Service applications will access oranges first, then bananas, then apples. If you want to have more control over the order in which these files are accessed:

- Use a control file (.JWC) to manage your compiled panel files. Use the Runtime= parameter to specify runtime package files that should be accessed at runtime to display GUI panels instead of host screens. For example:

```
Runtime=APPLES.JWR
```

```
Runtime=ORANGES.JWR
```

```
Runtime=BANANAS.JWR
```

In this example, the APPLES.JWR will be searched first for the panel that matches the current host screen. If a matching panel is found, it is displayed. If not, the next file, ORANGES.JWR, is searched, and so forth.

Adding or Replacing Custom Images

If you have any custom images to add or replace, copy them into the following folder.

For the iSeries-i5 Installation prior to uploading, copy your custom images into this path on the installation PC:

- For Employee Self-Service: C:\Program Files\SEAGULL\SERVER\JWALK\JWALKAPP\ERM9100App\Images
- For Customer Self-Service: C:\Program Files\SEAGULL\SERVER\JWALK\JWALKAPP\FULFLL9100App\Images
- For Supplier Self-Service: C:\Program Files\SEAGULL\SERVER\JWALK\JWALKAPP\SUPP9100App\Images

For the iSeries-i5 Installation after uploading, copy your custom images into this path on the iSeries-i5:

- For Employee Self-Service: /Your iSeries-i5 Web Server root folder/JWALK/JWALKAPP/ERM9100App/Images
- For Customer Self-Service: /Your iSeries-i5 Web Server root folder/JWALK/JWALKAPP/FULFLL9100App/Images
- For Supplier Self-Service: /Your iSeries-i5 Web Server root folder/JWALK/JWALKAPP/SUPP9100App/Images

For the Windows NT-2000-2003 Server and J Walk Client for Windows Installations after uploading, copy to the following folder:

- For Employee Self-Service: C:\Inetpub\wwwroot\JWALKAPP\ERM9100App\Images
- For Customer Self-Service: C:\Inetpub\wwwroot\JWALKAPP\FULFLL9100App\Images
- For Supplier Self-Service: C:\Inetpub\wwwroot\JWALKAPP\SUPP9100App\Images

Appendix B - Common iSeries Commands

To enter commands for the J Walk Server on the iSeries, follow the procedure below.

To enter commands for the J Walk server on the iSeries

1. To check the configuration, enter WRKHTTPCFG.

Opt	Sequence Number	Entry
	00010	PASS /*
	00020	PASS /JWALK/* /JWALK/*
	00030	PASS /jwalk/* /jwalk/*

2. To start the HTTP server, enter STRTCPSVR SERVER(*HTTP).
3. To end the HTTP server, enter ENDTCPSPV SERVER(*HTTP).

```
[F4] FOR THIS SCREEN      Start TCP/IP Server (STRTCPSVR)
Type choices, press Enter.
Server application . . . . .> *HTTP      *ALL, *SNMP, *ROUTED...
+ for more values
Restart server . . . . .      *NONE      *NONE, *HTTP, *DNS, *DHCP
HTTP server:
  Server instance . . . . .    *ALL      Name, *ALL, *ADMIN
  Instance startup values . . .
```

4. To review the HTTP server when it is running, enter WRKACTJOB.

QHTTSPVR	QSYS	SBS	.0		DEQW
ADMIN	QTMHHTTP	BCH	.0	PGM-QZHBHTTP	CNDW
ADMIN	QTMHHTTP	BCI	.0		TIMW
ADMIN	QTMHHTTP	BCI	.0		TIMW

5. To start the J Walk server, enter SEAJWK/STRJWKSVR.
6. To end the J Walk server, enter SEAJWK/ENDJWKSVR.

```
[F4] FOR THIS SCREEN  START SEAGULL J WALK SERVER (STRJWKSVR)

Type choices, press Enter.

PROFILE ENTRY IN JWALK.INI ..> *DFT
WORKING DIRECTORY . . . . . *DFT
```

Note: To start the Proc73 Server type in Proc73 at the profile entry field.

- To access SEAJWKSVR, enter WRKSBSD SBSD(QSYSWRK), enter 8 next to QSYSWRK, and scroll down several times.

```
QZSOSMAPD  QUSER      BATCH      ACTIVE
SEAJWKSVR  QSECOFR    BATCH      ACTIVE      PGM-SEAJWKSVR
```

- To start the License and Message Server, enter SEALMS/STRLMSTCP.
- To end the License and Message Server, enter SEALMS/ENDLMSTCP.
- To determine whether any object locks exist after ending the License and Message Server (or when having trouble ending), enter the following command. Resolve any locks before starting the License and Message Server. When running, these two objects should exist:

```
WRKOBJLCK OBJ(SEALMS/SEAUSR) OBJTYPE(*FILE) [ENTER]
```

```
WRKOBJLCK OBJ(SEALMS/SEALIC) OBJTYPE(*FILE) [ENTER]
```

- To access SEALMSDMN, type WRKSBSD SBSD(QSYSWRK) and press Enter. Enter 8 next to QSYSWRK and scroll down several times.

```
SEALMSDMN  QSECOFR    BATCH      ACTIVE      PGM-SEALMSTCP
```

- To display the directory structure on your AS/400, enter WRKLNK

Appendix C – Start and End J Walk Servers

You enter commands to start and end the three optional Self- Service Native J Walk Servers. Enter the following commands on an iSeries command line:

For the Employee Self-Service Native J Walk Server:

- To start the J Walk server, enter SEAJWK/STRJWKSVR PROFILE(ERM91).
- To end the J Walk server, enter SEAJWK/ENDJWKSVR PROFILE(ERM91).

For the Customer Self-Service Native J Walk Server:

- To start the J Walk server, enter SEAJWK/STRJWKSVR PROFILE(FULFLL91).

- To end the J Walk server, enter SEAJWK/ENDJWKSVR PROFILE(FULFLL91).

For the Supplier Self-Service Native J Walk Server:

- To start the J Walk server, enter SEAJWK/STRJWKSVR PROFILE(SUPP91).
- To end the J Walk server, enter SEAJWK/ENDJWKSVR PROFILE(SUPP91).

To start any of the three optional Self – Service Windows J Walk Servers, click Start/Programs/LegaSuite/<version of Server>, (for example, 4.1038.1.200).

Then choose one of the following:

- For the Employee Self-Service Native J Walk Server:
Choose Start A9.1 Employee Server
- For the Customer Self-Service Native J Walk Server:
Choose Start A9.1 Fulfillment Server
- For the Supplier Self-Service Native J Walk Server:
Choose Start A9.1 Supplier Server

After starting a Windows J Walk Server, the Seagull icon displays in the System tray.

To stop each Windows J Walk server, right click on the icon and choose, Stop J Walk Server.

Appendix D – URL Links for Self-Service Clients

To access any of the three optional Self– Service J Walk Clients, enter one of the following URL addresses in a browser address field:

For the Employee Self-Service Client:

- If you are using NT Client, enter <http://<PC server name>/erm91.html>
- If you are using Native Client install, enter <http://iSeries machine name/jwalk/erm91.html>

For the Customer Self-Service Client:

- If you are using NT Client, enter <http://<PC server name>/fulfl191.html>
- If you are using Native Client install, enter <http://iSeries machine name/jwalk/fulfl191.html>

For the Supplier Self-Service Client:

- If you are using NT Client, enter <http://<PC server name>/supp91.html>
- If you are using Native Client install, enter <http://iSeries machine name/jwalk/supp91.html>

Appendix E – Setting Up Product Catalog Image Access

To set up the display of an image on the Customer Self-Service Product Catalog screens, the iSeries Picture Key path information must be set up within the Client deployment area where you copied the image. If the administrator copies the Product Catalog images to be directly underneath the FULFLL9100APP folder for either a Native or Windows Server Client, then you only need to add the name of the image, including the extension, as the path for the Picture Key information. See the field description for the Picture Key field in the field explanation table under *Catalog Detail Information form (P41903) Fields*.

For the Native iSeries Java Client, you must copy the images manually into `www/apachedft/htdocs/JWALK/JWALKAPP/FULFLL9100APP` or another HTTP server folder.

For the Windows Java Client, you must copy the images manually into `Inetpub/wwwroot/JWALKAPP/FULFLL9100APP`.

If the administrator adds a folder to the paths, then you must add this folder to the Picture Key path. The user entering the Picture Key image paths must also add this folder in front of the image name. If you add a new folder, Catalog Images, and is to contain the Product Catalog images, then the Picture Key path must be `Catalog Images/test.jpg`