

Upgrade Guide

BuyerXpert 4.1

Version 4.1, Service Pack 3

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About This Document

The *BuyerXpert 4.1 Upgrade Guide* contains information and recommendations on how a BuyerXpert 3.x customer should migrate data to BuyerXpert 4.x.

NOTE Instructions for upgrading from BuyerXpert 4.1 SP1 to SP3 and from SP 2 to SP3 are contained in the BuyerXpert 4.1 SP3 *Release Notes*.

This preface contains the following sections:

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

Audience

The audience for this document is anyone who plans or implements the upgrade, whether it be a professional services team, or a BuyerXpert customer team. The upgrade team members should have experience working with the following:

- Multi-hosted systems
- Web servers, directory servers, and application servers
- UNIX operating system

- Oracle and LDAP databases
- TCP/IP communications
- Open Buying on the Internet (OBI)
- Internet browsers
- BuyerXpert Import Utility (see the BuyerXpert *Administrator's Guide* chapter about the Import utility)

What's in This Document

The following table summarizes what each chapter covers.

Table 1 Chapter Summary

If you want to know about this	See this chapter
Description of the contents of this guide; listing of documentation set; information on product support	"About This Document"
Overview of the upgrade process and a description of the Upgrade utility.	Chapter 1, "Overview of the Upgrade Process"
Planning to migrate data from BuyerXpert 3.x to BuyerXpert 4.x; establishing an upgrade team; writing an upgrade plan.	Chapter 2, "Planning the Upgrade"
Instructions for using the Upgrade utility to automate the data migration.	Chapter 3, "Using the Upgrade Utility to Automate Data Migration"
Instructions for completing the data migration after using the Upgrade Utility	Chapter 4, "Completing the Upgrade"
Instructions for migrating data from BuyerXpert 4.0 to BuyerXpert 4.1 or higher.	Appendix A, "Upgrading from BuyerXpert 4.0 to 4.1"

Documentation Conventions

This document uses the following conventions:

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

The Document Online

For an overview of BuyerXpert 3.x to BuyerXpert 4.0 changes, refer to the BuyerXpert 4.0 Release Notes.

The Upgrade utility and an electronic version of these notes are available at:

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

How to Use the Online Help

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

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

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

Related Documentation

The BuyerXpert documentation set includes:

- *Release Notes*—Contains important information on the current release of BuyerXpert. Read this document before working with the new BuyerXpert release.
- *Administrator's Guide*—Provides reference information and instructions on administering a fully-installed BuyerXpert system.
- *Concepts*—Describes the over-all functionality of BuyerXpert. Read this document if you are unfamiliar with BuyerXpert.
- *Installation Guide*—Provides instructions for installing the BuyerXpert product and its enabling software.
- *Upgrade Guide*—Provides guidelines and instructions for upgrading an existing BuyerXpert system, including migrating existing data and configurations.
- Admin interface Help—Provides guidelines and instructions for using the graphical administrative interface to administer BuyerXpert.
- User interface Help—Provides guidelines and instructions for performing the procurement tasks of BuyerXpert.
- Catalog interface Help—Provides guidelines and instructions for managing catalogs.

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

- Actuate documentation
- *ECXpert Administration Guide*
- *ECXpert Operations Reference Manual*
- *iPlanet Market Maker Catalog Import Guide*

Documentation for all iPlanet products can be found at the following web site:

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

Product Support

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

- iPlanet online support web site at:

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

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

- The telephone dispatch number associated with your maintenance contract

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

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

Overview of the Upgrade Process

This chapter describes how to migrate data from one instance of BuyerXpert 3.x to another instance of BuyerXpert 4.x using the Upgrade utility.

NOTE The information in this chapter is based on the assumption that you have already read the BuyerXpert *Concepts* and *Release Notes*.

This chapter contains the following sections:

- About the Upgrade Process
- About the Upgrade Utility

About the Upgrade Process

The upgrade process consists of migrating data to BuyerXpert 4.x from BuyerXpert 3.x using the Upgrade utility.

The following scenarios are possible:

- Migrate legacy data from a BuyerXpert 3.x instance to a BuyerXpert 4.1 or higher system
- Upgrade BuyerXpert 4.0 data store for use with BuyerXpert 4.1 or higher Oracle schema and new business rules.

NOTE You cannot not use the Upgrade utility to migrate legacy data from BuyerXpert 3.x to BuyerXpert 4.0

Upgrade Tasks

Table 1-1 lists the tasks required for the upgrade process. The right-hand column provides information about where to find instructions, guidelines, or tools for performing that task.

Table 1-1 Upgrade Tasks

Task	Location of Instructions/Guidelines/Tools
Plan the upgrade process and write an upgrade plan.	Chapter 2, “Planning the Upgrade”
Use the Upgrade utility to automate the data migration process	Chapter 3, “Using the Upgrade Utility to Automate Data Migration”
Complete the upgrade process.	Chapter 4, “Completing the Upgrade”

About the Upgrade Utility

The BuyerXpert Upgrade utility allows you to migrate data modules from an instance of BuyerXpert 3.x to an instance of BuyerXpert 4.x. Listed below are the modules that you can migrate from BuyerXpert 3.x to BuyerXpert 4.x:

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

Automated Data Migration

The Upgrade utility extracts data to be migrated from BuyerXpert 3.x. The typical data migration process is a multi-phase process, as described below.

Typical Data Migration Tasks

1. The Upgrade utility extracts data from a BuyerXpert 3.x database (CADIS or Oracle) and writes the data to an import file.
2. The Upgrade utility passes the import files to the BuyerXpert 4.x Import utility.
3. The Import utility imports the BuyerXpert 3.x data import files to a BuyerXpert 4.x database (Oracle or iPlanet MarketMaker).

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

For example, you can use the Upgrade utility to extract data from BuyerXpert 3.x and create the import files, and then stop the upgrade process. Later, you can migrate the import files to BuyerXpert 4.x using the Import utility.

Data Migration Exceptions

The data migration process varies for the following data modules:

- **Catalogs**—The Upgrade utility writes the extracted data to an XML import file and passes the data to iPlanet MarketMaker, which writes the data to a BuyerXpert 4.x database.
- **Approval Log**—The Upgrade utility writes the extracted data directly to a BuyerXpert 4.x database.

Manual Data Migration

Certain BuyerXpert components cannot be migrated with the Upgrade utility and must be migrated separately after you migrate data from BuyerXpert 3.x to BuyerXpert 4.x using the Upgrade utility.

There is also new functionality in BuyerXpert 4.x, where comparable data does not exist in BuyerXpert 3.x. You must complete the following manual data migration tasks before you can deploy the staging system (see Chapter 4, “Completing the Upgrade” for more information):

- Change user passwords
- Configure the iPlanet Process Manager
- Protect secure information, such as credit card information
- Set catalog and catalog view permissions

- Configure new BuyerXpert business rules
- Migrate user customizations lost in the upgrade process

Table 1-2 lists the BuyerXpert 4.x data components that can be migrated, indicates if their migration can be automated by the Upgrade utility, and the data migration method.

Table 1-2 Data Migration Method (1 of 3)

BX 4.x Module / Component	Automated Migration	Migration Method
Membership		
Organizations	Yes	Upgrade utility to Import Utility
Organizational Units	Yes	Upgrade utility to Import Utility
User Groups	Yes	Upgrade utility to Import Utility
Users	Yes	Upgrade utility to Import Utility
Location	Yes	Upgrade utility to Import Utility
Default Location Rules	Yes	Upgrade utility to Import Utility
Catalog		
Catalogs	Yes	Upgrade Utility to iPlanet MarketMaker
Order Management System (OMS)		
Price lists	Yes	Upgrade utility to Import Utility
Price Column	Yes	Upgrade utility to Import Utility
Price Item	Yes	Upgrade utility to Import Utility
Price List Info	Yes	Upgrade utility to Import Utility
Adjustments	Yes	Upgrade utility to Import Utility
Payment Terms	Yes	Upgrade utility to Import Utility
Freight Terms	Yes	Upgrade utility to Import Utility
Ship Method	Yes	Upgrade utility to Import Utility
Payment Type	Yes	Upgrade utility to Import Utility
Payment Subtype	Yes	Upgrade utility to Import Utility
Payment Instruments	Yes	Upgrade utility to Import Utility
Credit Card Instruments	Yes	Upgrade utility to Import Utility
Unit Class	Yes	Upgrade utility to Import Utility
Unit	Yes	Upgrade utility to Import Utility

Table 1-2 Data Migration Method *(Continued)* (2 of 3)

BX 4.x Module / Component	Automated Migration	Migration Method
Unit Conversion Table	Yes	Upgrade utility to Import Utility
Unit Conversion Table Entry	Yes	Upgrade utility to Import Utility
Commodity Codes		
Commodity Codes	Yes	Upgrade utility to Import Utility
Accounting Codes		
Accounting Codes	Yes	Upgrade utility to Import Utility
Business Rules		
All	Yes	Upgrade utility
Accounting Codes	Yes	Upgrade utility
Additional Info	No	None
Catalog	No	None
Community Code	Yes	Upgrade utility to Import Utility
Currency	Yes	Upgrade utility to Import Utility
Discount Charge	Yes	Upgrade utility to Import Utility
Display Preferences	No	None
Location	Yes	Upgrade utility to Import Utility
Interface (Order Transmission)	Yes	Upgrade utility to Import Utility
Inventory	No	None
Order Entry	Yes	Upgrade utility to Import Utility
Permissions	Yes	Upgrade utility to Import Utility
Pricing	Yes	Upgrade utility to Import Utility
Product	Yes	Upgrade utility to Import Utility
Payment	Yes	Upgrade utility to Import Utility
Security	Yes	Upgrade utility to Import Utility
Shipping	Yes	Upgrade utility to Import Utility
Receiving	No	None
Tax	Yes	Upgrade utility to Import Utility
Unit Conversion	Yes	Upgrade utility to Import Utility

Table 1-2 Data Migration Method *(Continued)* (3 of 3)

BX 4.x Module / Component	Automated Migration	Migration Method
Approval	Yes	Upgrade utility to Import Utility
Misc.	Yes	Upgrade utility to Import Utility
Permissions		
Permission Rules		Upgrade utility to Import Utility
Permission Levels		Upgrade utility to Import Utility
Approval		
Approver Matrix	Yes	Upgrade utility to Import Utility
Delegations	Yes	Upgrade utility to Import Utility
Approval Log	Yes	Upgrade utility directly to Oracle database
Process Definitions	No	None
Process Instances and Tasks	No	None

Planning the Upgrade

This chapter describes how to plan the upgrade from a BuyerXpert 3.x instance to a BuyerXpert 4.x instance using the Upgrade utility.

This chapter contains the following sections:

- Establishing an Upgrade Team
- Analyzing the Buying Environment
- Planning the Organizational Hierarchy
- Writing an Upgrade Plan

Establishing an Upgrade Team

To plan for the upgrade process, you should create an upgrade team that consists of the following members:

- BuyerXpert technical expert
- LDAP expert
- Oracle expert (DBA)
- Business expert

BuyerXpert Technical Expert

This person must be experienced in installing, configuring, and maintaining the existing BuyerXpert 3.x instances, understand the resources set at the organization and user level, and understand the Import utility. The technical expert can be from professional services or can be a BuyerXpert administrator.

The technical expert should be able to replicate the approval processes in the `procs.seed` setup in BuyerXpert 3.x to BuyerXpert 4.x. The technical expert is also responsible for completing post migration tasks and manually migrating customizations lost in the automated data migration.

LDAP Expert

This person must be familiar with LDAP server handling and support, because BuyerXpert 4.x uses LDAP to store the membership details. In BuyerXpert 3.x, membership data is stored in an Oracle database. The Upgrade utility transfers data from Oracle to LDAP if the LDAP schema or the directory structure in LDAP is available. The LDAP organization structure varies between organizations, so the LDAP expert must know how to structure with the BuyerXpert system.

Oracle Expert (DBA)

Even though both versions of BuyerXpert use Oracle as a native database, BuyerXpert 4.0 has schema changes and new features. The Oracle expert should be able to create the database environment with the basic BuyerXpert requirements. Expected expertise for this person is a DBA level.

Business Expert

This person works with BuyerXpert core member to fill the gap after the data migration as the rules cannot be matched one to one between both the BuyerXpert versions. Helping in setting up rules for the users and the organization is the primary task of the business expert. The business expert is responsible for designing the multi-organizational system and give assisting the LDAP expert in setting up the directory structure.

Analyzing the Buying Environment

To develop an upgrade plan, you need to calculate the average time it takes your buyer organization to approve a requisition and submit it as an order. You can use your average submission/approval time for a requisition to plan how far in advance your buyer organization must stop submitting new requisitions. This allows you to minimize the number of requisitions that are still pending approval on your planned data migration date.

After migrating your data, you must resubmit any requisitions that are pending approval. You should minimize the number of pending requisitions before migrating your data to reduce the number of post migration tasks.

Establishing a Cut-off Date for New Orders

It is important that you establish a clear cut-off date for creating new orders.

For example, if your average approval process takes four days for 85% of the requisitions, the cut-off date should be at least four business days before your migration date. If you can increase this time period without disrupting your business, it is recommended.

Planning the Organizational Hierarchy

Before you can migrate data to BuyerXpert 4.x, you must first determine whether or not your e-Procurement system will be multi-organizational. If so, you must define the membership structure within each organization.

There are two main areas to consider when making the multi-organizational decision:

- Current BuyerXpert 3.x system
- Planned BuyerXpert 4.x. system

You must consider both environments before determining your upgrade strategy and deciding if your BuyerXpert 4.x system will be multi-organizational.

Current BuyerXpert 3.x System

You could have deployed your current BuyerXpert 3.x system in one of several ways:

1. One instance of BuyerXpert 3.x that represents a single organization.
2. Several instances of BuyerXpert 3.x, where each instance represents a separate organization.

3. Multiple instances of BuyerXpert 3.x, where each instance does not functionally represent a separate organization.

NOTE A single instance of BuyerXpert 4.x can accommodate all organizations within an enterprise. Therefore, all the upgrade scenarios addressed here contain only one instance of BuyerXpert 4.x.

Multi-Organizational Structure

Although the decision on whether or not to implement a multi-organizational structure in BuyerXpert 4.x is most likely determined by your existing BuyerXpert 3.x system configuration, you can change the organizational structure from its present configuration.

NOTE Changing your existing BuyerXpert 3.x configuration is not recommended by iPlanet, nor is it fully supported by the Upgrade utility.

If you want to pursue this path, Table 2-1 outlines the characteristics, benefits, and limitations of a single versus a multi-organizational structure.

Table 2-1 BuyerXpert 3.x and 4.x Multi-Organizational Characteristics *(1 of 2)*

Factor	3.x Characteristics	3.x Limitations	4.x Improvements	4.x Issues
Accounting and Commodity Codes	Each instance supports only one set of accounting and commodity codes.	Each unique set of commodity or accounting codes requires a separate instance of BuyerXpert 3.x	Each organization can maintain one set of accounting and commodity codes. Structure and values can vary per organization.	Each set of accounting and commodity codes are specific to an organization and cannot be shared. There will be duplication if you have a large amount of data overlap in the codes, and you will need to maintain each organization separately.

Table 2-1 BuyerXpert 3.x and 4.x Multi-Organizational Characteristics (*Continued*) (2 of 2)

Factor	3.x Characteristics	3.x Limitations	4.x Improvements	4.x Issues
Business Rules	Each instance supports only one set of business rules at the organizational level.	If you want several sets of rules at the organizational level, you need to install several instances of BuyerXpert 3.x.	Multi-organizational structure supports one set of rules at the organizational level. These rules can be inherited from the root organization or defined separately at the individual organizational level.	A higher complexity in rules needs to be maintained.
Approval Processes	Only one set of approval processes can be maintained for each BuyerXpert instance.	There is no possible separation of approval processes within one instance of BuyerXpert 3.x.	Approval processes are owned at the organizational level. A multi-organizational structure allows each organization to have its own approval processes, which would be distinctly separated from any other organizations.	The creation of a multi-organizational structure within an enterprise that has no need for separate approval processes creates a situation with data duplication and maintenance.

Defining the Membership Structure

You should also plan the remainder of the membership hierarchy, from organization down, at this time. Refer to the BuyerXpert *Administrator's Guide* for instructions about how to define the membership structure.

Writing an Upgrade Plan

The upgrade team should develop an overall plan for their BuyerXpert upgrade. This plan varies for different organizations, and should be based on, but not limited to, the following factors:

- Life cycle of the average purchase requisition
- Size and complexity of the current BuyerXpert 3.x stem
- Size and complexity of the upgraded BuyerXpert 4.x system

- Overall strategy for the upgrade process
- Functionality of a multi-organizational structure and any relevant implications
- Functionality of the Upgrade utility and any relevant implications

The upgrade plan concludes with a *go live* date, at which time the staging system becomes the production environment.

The upgrade plan must be communicated to those involved in the buying process so that they are aware of key dates, such as the cutoff date for the creation of new purchase requisitions.

Using the Upgrade Utility to Automate Data Migration

This chapter describes how to automate the migration of data modules from BuyerXpert 3.x to 4.x using the Upgrade utility. It contains the following sections:

- Pre-Upgrade Tasks
- How to Use the Upgrade Utility
- Using the Upgrade Utility User Interface
- Migrating Multi-Organizational Data

Pre-Upgrade Tasks

You should complete the following tasks before using the Upgrade utility.

Backup BuyerXpert Data

You need to coordinate the backup of LDAP directory data, import files, customization files, and staging files before you begin installing BuyerXpert 4.x.

- LDAP directory data
- Import files
- Staged update files
- Customization files
- Oracle database

Set Up UNIX Access Permissions

The following UNIX permissions are required:

- Write access to the `/tmp` directory
- Execution access to the `/bin` directory

The Oracle users for both the default and staging data sources must have DBA privileges in order to run the Approval Log component.

Determine Data Import File Location Defaults

The data import files created by the Upgrade utility are stored in the `/tmp` directory. You may want to change this default because the `/tmp` directory is emptied each time you reboot a UNIX. To do so, change the default location in the `upgradeinfo.ntv` file.

Set Up a Staging Environment

It is useful to set up a staging environment on a different UNIX system before installing the Upgrade utility and migrating your data. Later, you can use your staging environment as a production environment.

The staging environment should meet the following requirements:

- The machine meets all the minimum hardware and software requirements for BuyerXpert 4.x. See the BuyerXpert *Installation Guide* for specific hardware and software requirements.
- BuyerXpert 4.x is installed and configured, along with all dependent and certified BuyerXpert software.
- Instances of BuyerXpert required applications should not be used by any other application. This includes Oracle, the iPlanet Application Server, and the iPlanet Directory Server.

Installing BuyerXpert 4.x

To access the Upgrade utility, you must install a dedicated installation of BuyerXpert 4.x and its components. To install BuyerXpert 4.x, follow the instructions in the BuyerXpert 4.x *Installation Guide*, chapter 4, “Installing BuyerXpert”.

At the end of the installation, you will be asked if you want to install the Upgrade utility. Answer yes and BuyerXpert will install the Upgrade utility.

How to Use the Upgrade Utility

The Upgrade utility provides a graphical interface that allows you to initiate, manage, and monitor upgrade sessions. At any point you can stop the Upgrade utility and restart it at a later time.

The Upgrade utility allows you to migrate the following BuyerXpert data modules:

- Membership
- Catalogs
- Order Management System (OMS)
- Commodity Codes
- Accounting Codes
- Business Rules
- Permission
- Approval Process

Data Migration Tasks

You can automate the data migration from a BuyerXpert 3.x instance to a BuyerXpert 4.x instance using the Upgrade utility by completing the following tasks:

1. Create or define a profile on the Select Profile screen.
2. Select the components to upgrade on the Select Components to Upgrade screen.
3. Configure the site parameters by specifying the source parameters you are upgrading from and the destination parameters you are upgrading to on the Specify Site Parameters screen.
4. Select the modules to upgrade and run the profile for each from the Run Selected Modules screen.

Importing Large Amounts of Data

If you are importing large amounts of data from BuyerXpert 3.x to BuyerXpert 4.x to the Import utility, you can increase performance by selecting smaller increments of information to import at one time. For example, instead of importing all user groups for the membership component, you can select two or three user groups at a time.

Upgrading Membership

Upgrading the BuyerXpert membership component consists of migrating all user, organization, organizational unit, user group, and location. The membership module contains the following components:

- Organizations
- Organizational Units
- User Groups
- Users
- Location
- Default Location Rules

The Upgrade utility migrates the relationship between different membership components. The organizational hierarchy is represented through the organizational units and locations are migrated as part of the organization upgrade. Users are migrated as part of the organization upgrade.

NOTE All migrated users are give the password “iplanet” and have selfadmin privileges.

You must migrate an organization and all of its users before you can migrate the user groups.

Access Control

Migrating membership access control data is conservative. If a migrated user does not have equivalent privileges in BuyerXpert 4.x, the user is given lower access privileges.

NOTE All migrated users are given the password “iplanet” and have selfadmin privileges. You should set up a dummy upgrade user with superadmin privileges in your BuyerXpert 4.x system.

Upgrading Catalogs

You can migrate all catalogs or selected catalogs from BuyerXpert 3.x (CADIS) to BuyerXpert 4.x.

Each catalog is exported to an XML file that contains the extracted catalog data. BuyerXpert passes the XML file to the Catalog Loader, which imports the catalogs for use in BuyerXpert 4.x. The top level category in each XML file is the name of the individual catalogs.

Upgrading Order Management System (OMS)

The Order Management System (OMS) module contains the following components:

- Price Lists—Price Column, Price Item, Price List Information
- Adjustments
- Payment Terms
- Payment Instruments—Payment Type, Payment Subtype, Instrument, Credit Card Instrument
- Shipping Method
- Freight Terms
- Units—Unit Class, Unit Conversion Table, Unit Conversion Table Entry

The data migration process uses the following mapping between Adjustment name in BuyerXpert 3.x and BuyerXpert 4.x:

Table 3-1 Adjustment Component Mappings

BuyerXpert 3.x Template Name	BuyerXpert 4.x Template Name
ALLOWANCE	LINE_ADJUSTMENT
CHARGE	LINE_ADJUSTMENT
COLUMN_LOOKUP	PRICELIST_COLUMN_ADJUSTMENT
DISCOUNT	LINE_ADJUSTMENT
DISCOUNTMARKUP	PRICELIST_DISCOUNT_LOOKUP
FREIGHTBYSHIPMENTMETHOD	LINE_LEVEL_SHIPPING_CHARGE
FREIGHTBYSTATE	LINE_LEVEL_SHIPPING_CHARGE
FREIGHTBYCHARGE	LINE_LEVEL_SHIPPING_CHARGE
PROMOTION	LINE_ADJUSTMENT
TAXBYCOUNTRY	TAX_ADJUSTMENT
TAXBYSTATE	TAX_ADJUSTMENT
TAXBYTAXCODE	TAX_ADJUSTMENT

NOTE You will need to rename any BuyerXpert 3.x adjustments that are not listed above before you can migrate them.

To migrate the membership module, select the components you wish to migrate from the Select Components to Upgrade screen to add them to your current profile.

Upgrading Commodity Codes

The commodity codes module does not contain any subcomponents. To migrate the commodity codes from BuyerXpert 3.x to BuyerXpert 4.x, select Commodity Codes in the Select Components to Migrate screen to add the components to your current profile.

Upgrading Accounting Codes

The accounting codes module does not contain any subcomponents. To migrate the accounting codes from BuyerXpert 3.x to BuyerXpert 4.x, select Accounting Codes in the Select Components to Migrate screen to add the components to your current profile.

Upgrading Business Rules

The Select Rule Modules to Upgrade screen allows you to select the following rule components and add them to your current profile:

- Interface
- Payment
- Pricing
- Product
- Shipping
- Tax
- Approval
- Security
- Miscellaneous
- Accounting Codes

Upgrading Permissions

To migrate the permission module, select the components you wish to migrate from the Select Components to Upgrade screen to add them to your current profile. The permissions components are as follows:

- Permissions Levels
- Permission Rules

Upgrading Approval

To migrate the approval module, select the components you wish to migrate from the Select Components to Upgrade screen to add them to your current profile. The approval components are as follows:

- Approver Matrix
- Delegations
- Approval Log

Using the Upgrade Utility User Interface

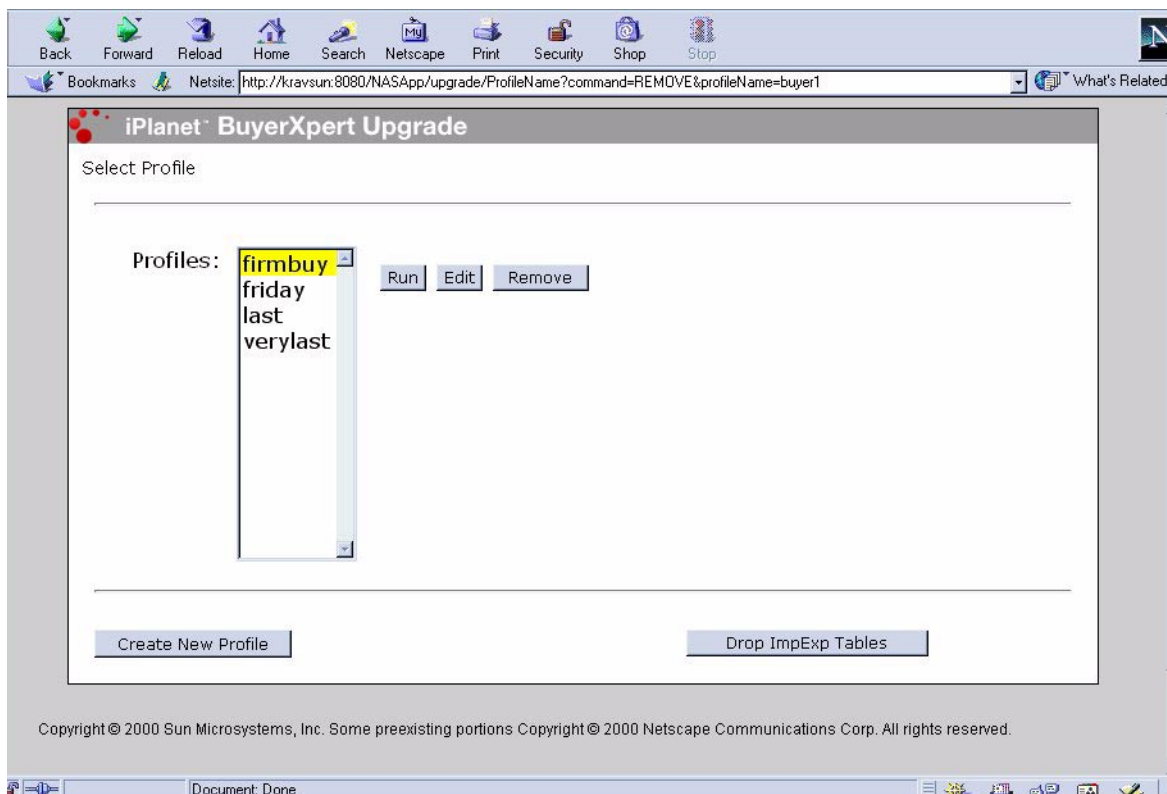
To start the Upgrade utility, access the following location. For example:

`http://host_name:port_number/NASApp/upgrade/WelcomeProfile`

The Select Profile screen displays.

Select Profile Screen

The Select Profile screen is the first welcome screen and allows you to define the profile for an upgrade session.

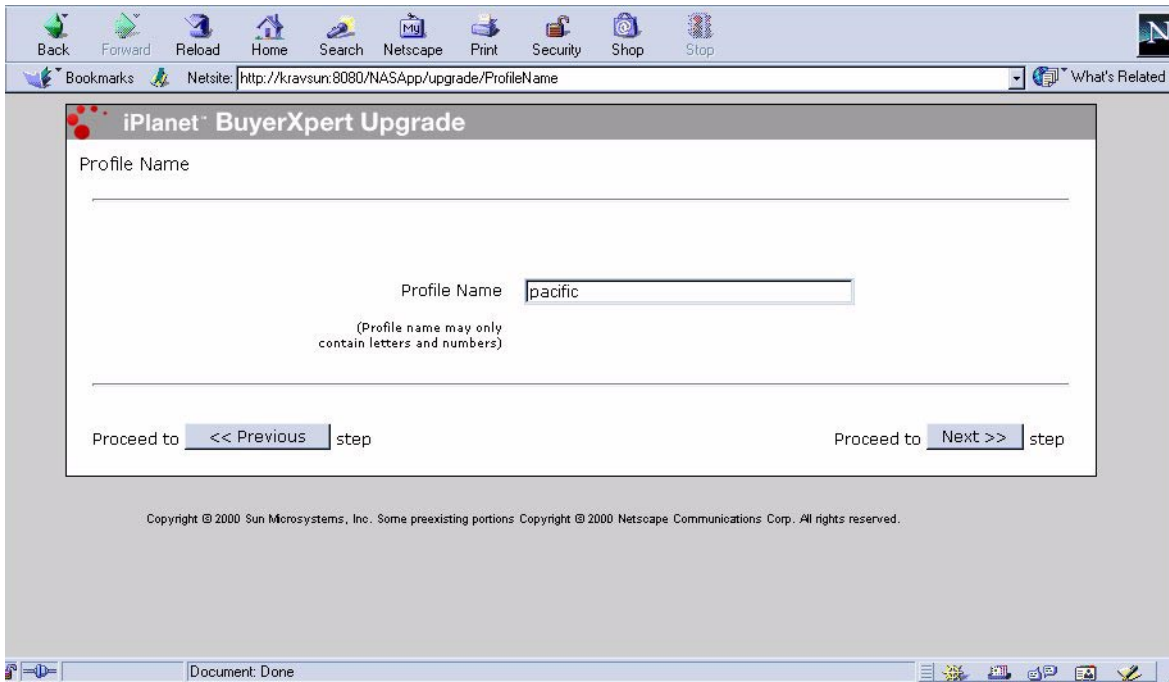


The following functions are available:

- **Run Profile**—The Run Selected Modules screen displays.
- **Edit Profile**—The Select Components to Upgrade screen displays.
- **Remove Profile**—The selected profile is removed.
- **Create New Profile**—Allows you to create a new profile.
- **Drop ImpExp Tables**—Deletes all information about the previous session (such as import data, log files, and report files).

To create a new profile, follow these steps:

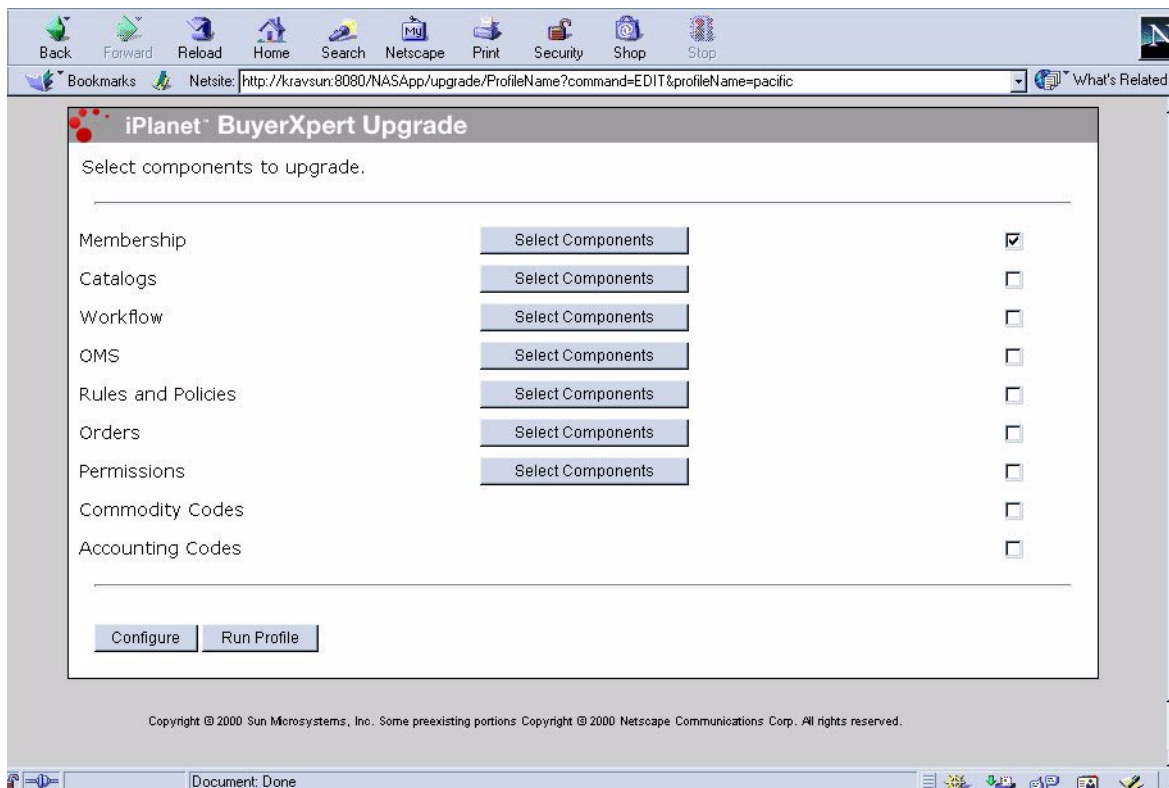
1. Click Create New Profile. The Profile Name screen displays:



You are prompted to enter a name for the new profile.

2. Enter a profile name and select Next.

The Select Components to Upgrade screen displays.



Select Components to Upgrade Screen

The Select Components to Upgrade screen allows you to select the modules you want to upgrade. After you select the components you want to upgrade, you can choose to configure the profile or run the profile:

- **Configure**—The Specify Site Parameters screen displays.
- **Run Profile**—The Run Selected Modules screen displays.

Specify Site Parameters Screen

The Specify Site Parameters screen lets you define the BuyerXpert 3.x source parameters you are upgrading from and the BuyerXpert 4.x destination parameters you are upgrading to.

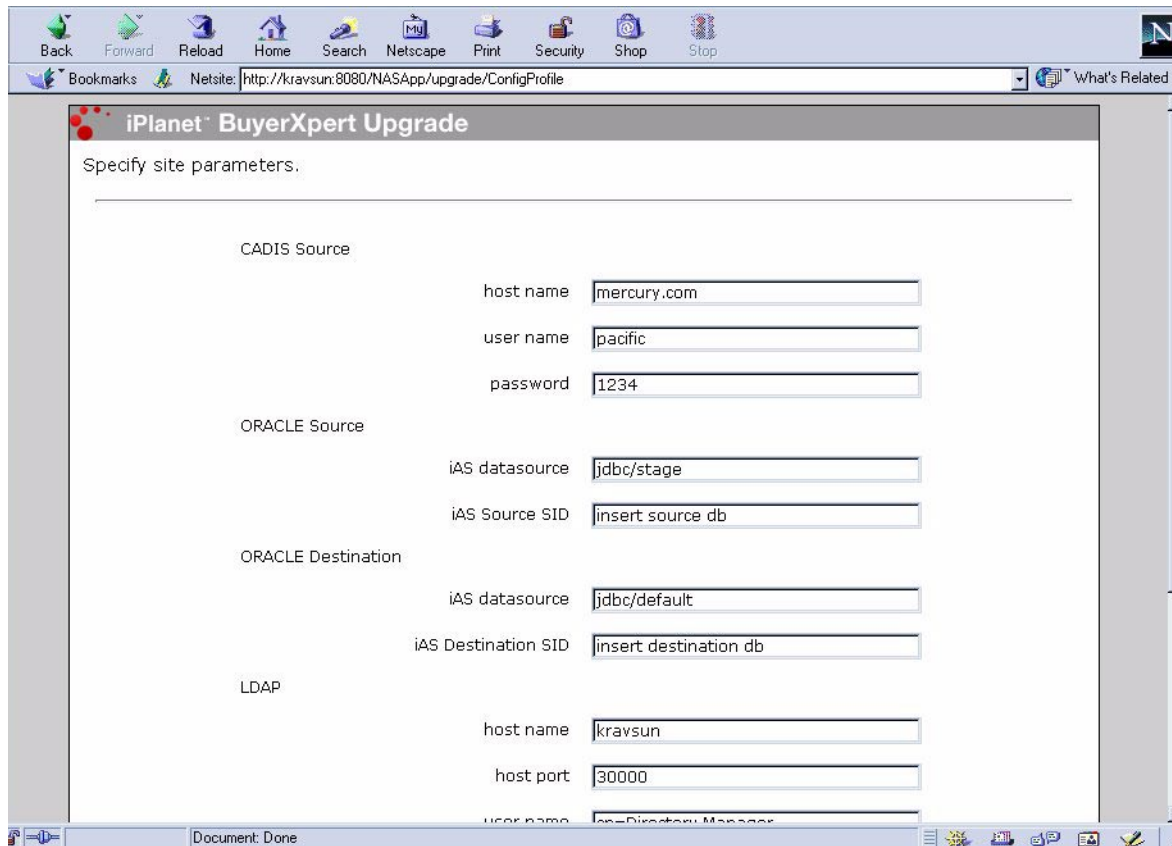


Table 3-2 lists the BuyerXpert 3.x source parameters and the BuyerXpert 4.x destination parameters.

Table 3-2 Upgrading Source Parameters

BuyerXpert 3.x Source Parameters	BuyerXpert 4.x Destination Parameters
CADIS Source	hostname user name password

Table 3-2 Upgrading Source Parameters (*Continued*)

BuyerXpert 3.x Source Parameters	BuyerXpert 4.x Destination Parameters
ORACLE source	iAS Datasource iAS Source SID
ORACLE destination	iAS Datasource iAS Source SID
LDAP	Host name Host port User name Password Root

Run Selected Modules Screen

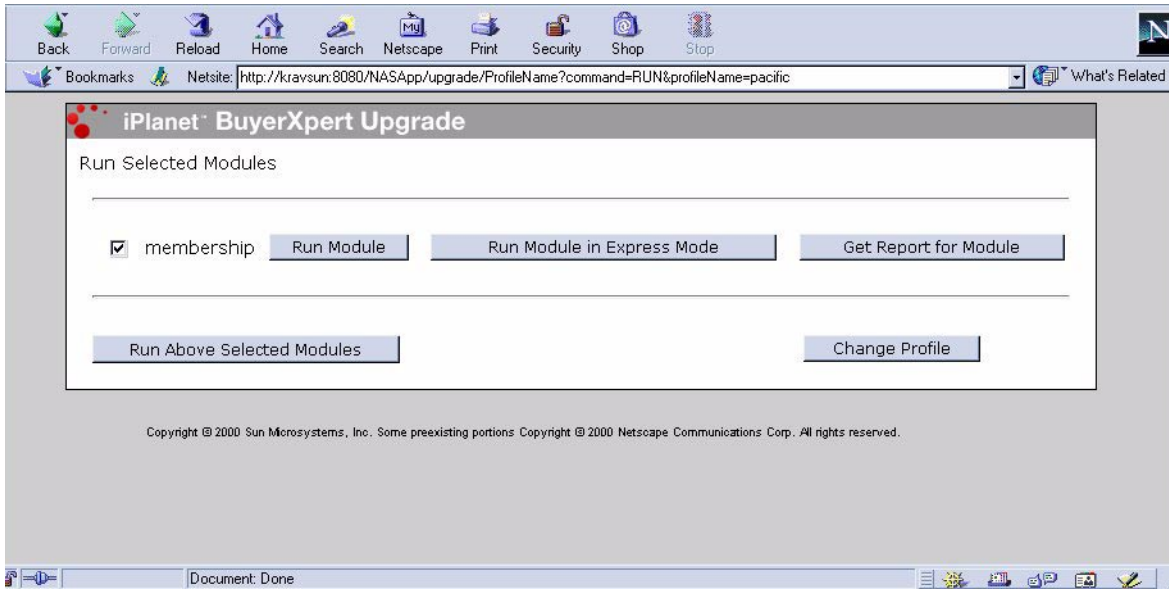
The Run Selected Modules screen lets you select which module(s) to upgrade. The following functions are available:

- **Run Module**—This function upgrades the data modules you select. The Run Selected Modules screen allows you to select the data module you want to upgrade.
- **Run Above Selected Modules**—This function is the same as Run Module, except you can select multiple modules that are all updated at one time.
- **Run Module in Express Mode**—This function allows you to run both the data export and import processes. The Run Selected Modules screen allows you to select the data modules you want to upgrade.
- **Run Report for Module**—This function allows you to generate a report for the upgrade session. The Get Report screen displays, which allows you to generate a report for the selected modules.
- **Change Profile**—This function allows you change profiles. The Select Profile screen displays, which allows you to select and change a profile.

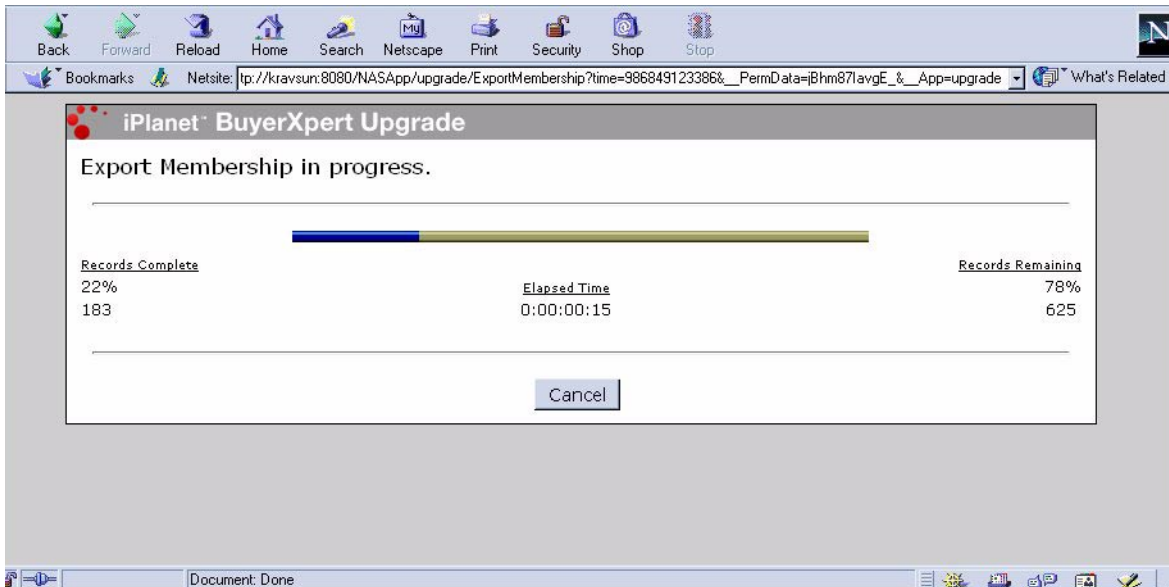
Selecting Modules to Upgrade

The Run Selected Modules screen displays when you select Run Profile from the Select Components to Upgrade Screen.

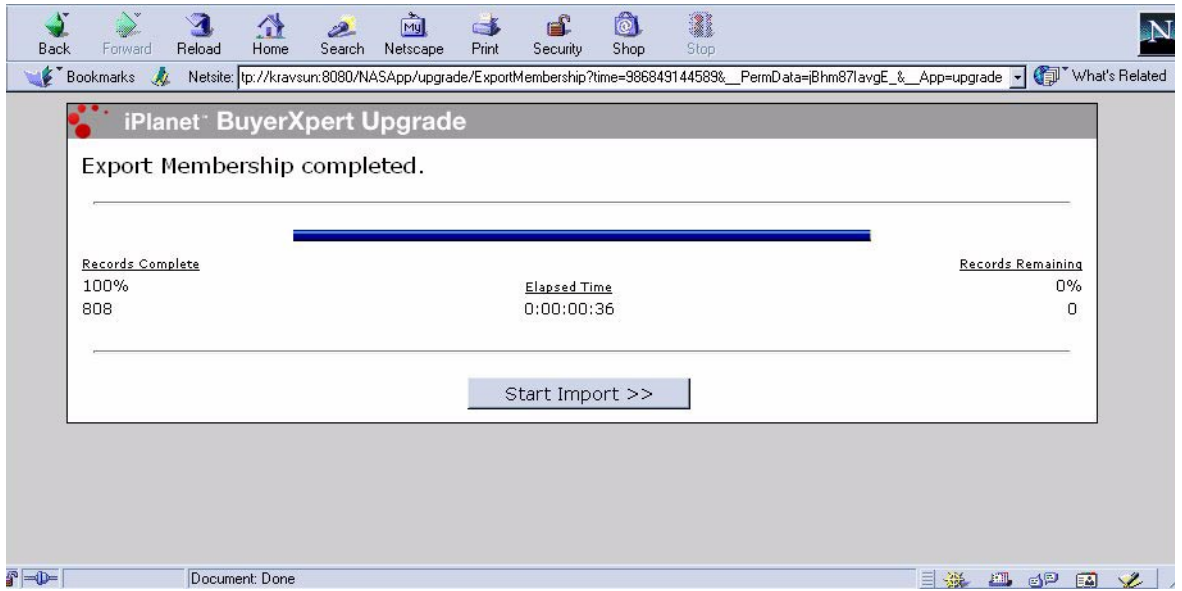
1. Select the modules you wish to upgrade and click Next to continue with the data migration process. The Run Selected Modules screen displays.



2. Select Run Modules or Run Above Selected Modules to upgrade the data modules you selected. The Export in Progress screen displays.

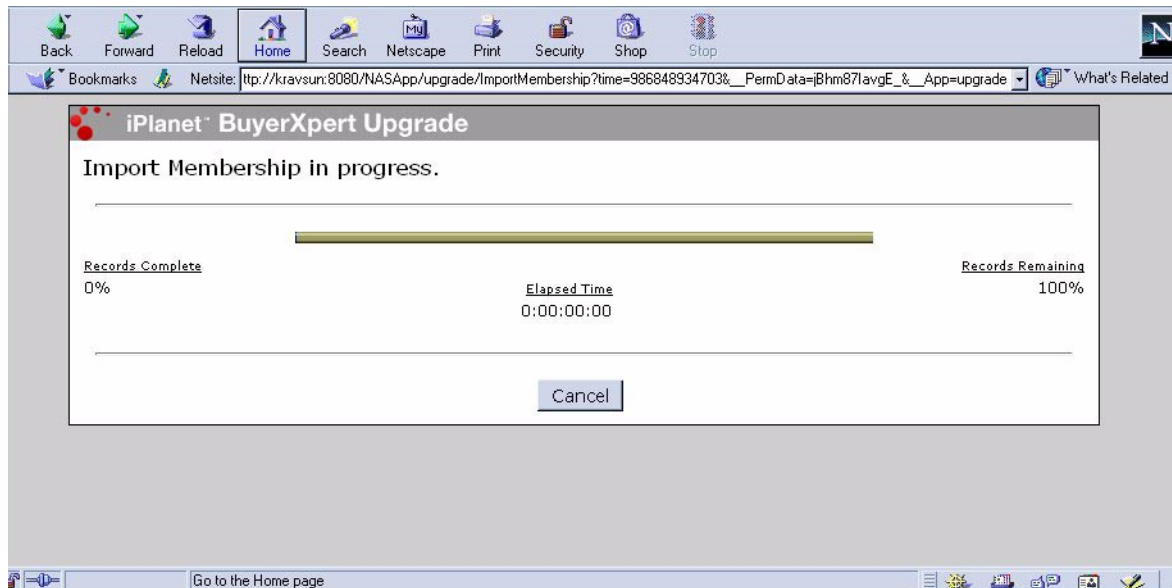


The Export Completed screen displays when the date export process completes.



Upgrade Status Screen

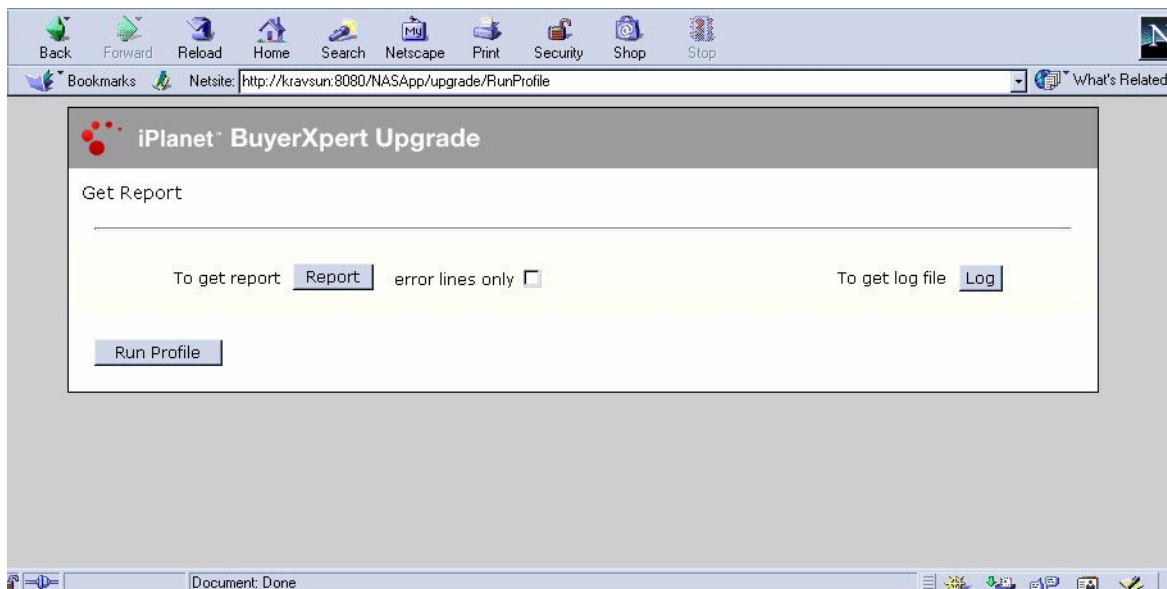
The Upgrade Status screen displays during the import process. It allows you to monitor the import process or stop an upgrade session.



Get Report Screen

The Get Report screen allows you to generate a report for the upgraded modules. The following functions are available:

- Get a Report—Displays the data import report for the Upgrade utility session.
- Get a Log File—Displays the data import log for the Upgrade utility session.
- Run Profile—Displays the Run Selected Modules screen.



Migrating Multi-Organizational Data

The Upgrade utility allows you to migrate data from a single organization structure into a multiple-organizational hierarchy structure. After you migrate the first BuyerXpert 3.x instance to a BuyerXpert 4.0 instance, additional BuyerXpert 3.x instances can be migrated to the BuyerXpert 4.0 instance.

This is achieved by modifying the following:

- LDAP configuration
- Membership import files

The following items need to be changed from the Configuration screen of the Upgrade utility:

- CADIS source
- Oracle source

Catalog destination (if migrating catalogs)

Modifying the LDAP Configuration

To eliminate the requirement of UID uniqueness across multiple organizations, complete the following tasks:

1. Start the console application and open the directory server that contains your data.
2. Change to your LDAP server configuration directory. For example:

```
% cd /export/console/slapd-machine-name/config
```
3. Open the `slapd.ldbm.conf` file in a text editor.
4. Comment out the following line by inserting a # sign.

```
# Plug in pre-operation on "uid uniqueness" /export.....
```
5. Restart the LDAP server.

Disable UID Uniqueness

You should disable UID uniqueness, which is set by default to the root directory during installation, by using the following procedure:

1. Start the console application and open the directory server that contains your data.
2. Select the configuration tab.
3. Expand the plug-in attribute on the left.
4. Deselect the UID uniqueness attribute.

Modifying the Membership Import Files

You need to modify the membership import files when you migrate a single organization structure to a multi-organization structure when you migrate membership data.

To do so, complete the following steps to change the parent of the organization you are importing:

1. Use the Run Selected Modules screen to select the membership module to upgrade on the Run Selected Modules screen (see “Select Components to Upgrade Screen”). Do not select Express mode. Instead, select Run Module or Run Above Selected Modules.

The Upgrade utility begins the upgrade process for the membership module. When the data export completes, leave your browser open. Do not click Next to proceed with the import

2. Change to the destination directory that contains the import `.imp` files. For example:

```
# cd /tmp
```

3. Open the following file in a text editor:

```
orgunits_org_id_timestamp.imp
```

For example, open `orgunits_2000_10_11_04_40.imp`.

4. Search for the line that contains the word `organization`. For example,

```
insert_overwrite, Organization
^name,parent_org,duns_number,legal_type,display_name,\
description,definable_id,status,effective_from_date,effective_to_da
te,\
email_addresses,websites,telephone_number,fax_number,\
postal_address1,postal_address2,postal_address3,postal_address4,pos
tal_address5,postal_address6
John Hancock,,99-999-1701,C_CORP,John Hancock Mutual Life Insurance
Co.,,2000,\
enabled,01/02/1970,12/30/2036,\
,USA,^617^572-6000^,^617^572-7756^,\
PO Box 111,Boston,MA,02117,,
```

5. Insert the following text o the right of the organization name, between the commas. For example:

```
[Organization name=name_of_parent_org]
```

6. Save and close the file.
7. Return to your browser window. Click Next to continue importing data.

Completing the Upgrade

After the you migrate data from BuyerXpert 3.x to BuyerXpert 4.x with the Upgrade utility, you must complete the following manual data migration tasks before deploying the staging system:

- Change user passwords
- Configure the iPlanet Process Manager
- Protect secure information, such as credit card information
- Set catalog and catalog view permissions
- Configure new BuyerXpert business rules
- Migrate user customizations lost in the upgrade process

Changing User Passwords

The Upgrade utility does not migrate user passwords. All user password are reset to iPlanet. For security reasons, all users must immediately change their passwords.

Configuring the Process Manager

In order to view the approver matrix and the approval log data, you must configure the Process Manager. See the *BuyerXpert Installation Guide* for instructions about how to configure the Process Manager.

Protecting Secure Information

During data migration, the Upgrade utility decrypts credit card information and stores it in the import files. This information is re-encrypted when it is imported into BuyerXpert 4.x. For security reasons, the import file containing this sensitive information is overwritten after import.

NOTE This overwrite is done by the Upgrade utility and does not occur if you import this information using the Import utility. You may want to do a manual audit on the `cci_time-date-stamp.imp` file to ensure that this file was correctly overwritten.

Migrating Pending Orders

Orders that were pending approval at the data migration time are migrated as drafts. The purchase order number appears with “upgrade_” before the number. These orders need to be resubmitted through the approval process.

Setting Catalog Views and Permissions

Permissions for catalogs and catalog views are not migrated. Refer to the *BuyerXpert Administrator's Guide* for instructions on how to set up this information.

Configuring New Business Rules

The Upgrade utility migrates all business rules that existed in BuyerXpert 3.x and have a corresponding business rule and role in BuyerXpert 4.x. However, the Upgrade utility cannot populate the new BuyerXpert 4.x business rules. You must configure these rules before deploying the staging system.

The reasons for less than a 100% automated business rule migration are:

- New rule functionality exists in BuyerXpert 4.x and there were no corresponding rules in BuyerXpert 3.x.
- No corresponding role in BuyerXpert 4.x exists for a voter in BuyerXpert 3.x.

The following tables list all of the BuyerXpert 3.x rules and voters and indicate whether or not they are migrated by the Upgrade utility.

Table 4-1 lists the BuyerXpert 3.x rule name and voter type, and whether or not it is migrated by the Upgrade utility.

Table 4-1 BuyerXpert 3.x Rules Migration Status (1 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
1. ACCOUNTING_CODE_SEG (1-99)	BILL_TO_LOCATION	No
2. ACCOUNTING_CODE_SEG (1-99)	BUYER_COMPANY	Yes
3. ACCOUNTING_CODE_SEG (1-99)	PRICELIST	No
4. ACCOUNTING_CODE_SEG (1-99)	PRODUCT	No
5. ACCOUNTING_CODE_SEG (1-99)	SELLER_COMPANY	No
6. ACCOUNTING_CODE_SEG (1-99)	USER_CREATED_FOR	Yes
7. ACCTG_CODE_DELIMITER	BUYER_COMPANY	No
8. COMMODITY_CODE_SEG (1-99)	BILL_TO_LOCATION	No
9. COMMODITY_CODE_SEG (1-99)	BUYER_COMPANY	Yes
10. COMMODITY_CODE_SEG (1-99)	PRICELIST	No
11. COMMODITY_CODE_SEG (1-99)	PRODUCT	No
12. COMMODITY_CODE_SEG (1-99)	SELLER_COMPANY	No
13. COMMODITY_CODE_SEG (1-99)	USER_CREATED_FOR	Yes
14. DISPLAY_CURRENCY	BUYER_COMPANY	Yes
15. DISPLAY_CURRENCY	USER_CURRENT	Yes
16. ORDER_XFER_VIA_ECX	BUYER_COMPANY	No
17. ORDER_XFER_VIA_ECX	SELLER_COMPANY	No
18. USER_DISPLAY_CURRENCY	BUYER_COMPANY	No
19. USER_DISPLAY_CURRENCY	USER_CURRENT	No
20. XMIT_DOCUMENT_FORMAT	BILL_TO_LOCATION	No
21. XMIT_DOCUMENT_FORMAT	BUYER_COMPANY	Yes
22. XMIT_DOCUMENT_FORMAT	SELLER_COMPANY	Yes
23. XMIT_DOCUMENT_FORMAT	USER_CREATED_FOR	Yes
24. XMIT_DOCUMENT_TYPE	BILL_TO_LOCATION	No
25. XMIT_DOCUMENT_TYPE	BUYER_COMPANY	Yes
26. XMIT_DOCUMENT_TYPE	SELLER_COMPANY	Yes
27. XMIT_DOCUMENT_TYPE	USER_CREATED_FOR	Yes

Table 4-1 BuyerXpert 3.x Rules Migration Status *(Continued)* (2 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
28. XMIT_DOCUMENT_VERSION	BILL_TO_LOCATION	No
29. XMIT_DOCUMENT_VERSION	BUYER_COMPANY	Yes
30. XMIT_DOCUMENT_VERSION	SELLER_COMPANY	Yes
31. XMIT_DOCUMENT_VERSION	USER_CREATED_FOR	Yes
32. XMIT_FUNCTIONAL_GROUP_ID	BILL_TO_LOCATION	No
33. XMIT_FUNCTIONAL_GROUP_ID	BUYER_COMPANY	No
34. XMIT_FUNCTIONAL_GROUP_ID	SELLER_COMPANY	No
35. XMIT_FUNCTIONAL_GROUP_ID	USER_CREATED_FOR	No
36. XMIT_MESSAGE_RELEASE_NO	BILL_TO_LOCATION	No
37. XMIT_MESSAGE_RELEASE_NO	BUYER_COMPANY	No
38. XMIT_MESSAGE_RELEASE_NO	SELLER_COMPANY	No
39. XMIT_MESSAGE_RELEASE_NO	USER_CREATED_FOR	No
40. XMIT_OTHER_FIELD	BILL_TO_LOCATION	No
41. XMIT_OTHER_FIELD	BUYER_COMPANY	No
42. XMIT_OTHER_FIELD	SELLER_COMPANY	No
43. XMIT_OTHER_FIELD	USER_CREATED_FOR	No
44. XMIT_RECEIVER_APP	BILL_TO_LOCATION	No
45. XMIT_RECEIVER_APP	BUYER_COMPANY	Yes
46. XMIT_RECEIVER_APP	SELLER_COMPANY	Yes
47. XMIT_RECEIVER_APP	USER_CREATED_FOR	Yes
48. XMIT_RECEIVER_APP_QUALIFIER	BILL_TO_LOCATION	No
49. XMIT_RECEIVER_APP_QUALIFIER	BUYER_COMPANY	Yes
50. XMIT_RECEIVER_APP_QUALIFIER	SELLER_COMPANY	Yes
51. XMIT_RECEIVER_APP_QUALIFIER	USER_CREATED_FOR	Yes
52. XMIT_RECEIVER_ID	BILL_TO_LOCATION	No
53. XMIT_RECEIVER_ID	BUYER_COMPANY	Yes
54. XMIT_RECEIVER_ID	SELLER_COMPANY	Yes
55. XMIT_RECEIVER_ID	USER_CREATED_FOR	Yes
56. XMIT_RECEIVER_ID_QUALIFIER	BILL_TO_LOCATION	No

Table 4-1 BuyerXpert 3.x Rules Migration Status *(Continued)* (3 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
57. XMIT_RECEIVER_ID_QUALIFIER	BUYER_COMPANY	Yes
58. XMIT_RECEIVER_ID_QUALIFIER	SELLER_COMPANY	Yes
59. XMIT_RECEIVER_ID_QUALIFIER	USER_CREATED_FOR	Yes
60. XMIT_SENDER_APP	BILL_TO_LOCATION	No
61. XMIT_SENDER_APP	BUYER_COMPANY	Yes
62. XMIT_SENDER_APP	SELLER_COMPANY	Yes
63. XMIT_SENDER_APP	USER_CREATED_FOR	Yes
64. XMIT_SENDER_APP_QUALIFIER	BILL_TO_LOCATION	No
65. XMIT_SENDER_APP_QUALIFIER	BUYER_COMPANY	Yes
66. XMIT_SENDER_APP_QUALIFIER	SELLER_COMPANY	Yes
67. XMIT_SENDER_APP_QUALIFIER	USER_CREATED_FOR	Yes
68. XMIT_SENDER_ID	BILL_TO_LOCATION	No
69. XMIT_SENDER_ID	BUYER_COMPANY	Yes
70. XMIT_SENDER_ID	SELLER_COMPANY	Yes
71. XMIT_SENDER_ID	USER_CREATED_FOR	Yes
72. XMIT_SENDER_ID_QUALIFIER	BILL_TO_LOCATION	No
73. XMIT_SENDER_ID_QUALIFIER	BUYER_COMPANY	Yes
74. XMIT_SENDER_ID_QUALIFIER	SELLER_COMPANY	Yes
75. XMIT_SENDER_ID_QUALIFIER	USER_CREATED_FOR	Yes
76. INVENTORY_MGMT_MODEL	BUYER_COMPANY	No
77. INVENTORY_MGMT_MODEL	PRODUCT	No
78. INVENTORY_MGMT_MODEL	SELLER_COMPANY	No
79. INVENTORY_UOM	PRODUCT	No
80. INVENTORY_UOM	SELLER_COMPANY	No
81. INVENTORY_UOM_DIM	PRODUCT	No
82. INVENTORY_UOM_DIM	SELLER_COMPANY	No
83. INVENTORY_UOM_WEIGHT	PRODUCT	No
84. INVENTORY_UOM_WEIGHT	SELLER_COMPANY	No
85. PROD_AVAIL_MODEL	BUYER_COMPANY	No

Table 4-1 BuyerXpert 3.x Rules Migration Status *(Continued)* (4 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
86. PROD_AVAIL_MODEL	PRODUCT	No
87. PROD_AVAIL_MODEL	SELLER_COMPANY	No
88. PROD_AVAIL_MODEL	SHIP_FROM_LOCATION	No
89. APPROVAL_LIMIT	USER_GROUP	Yes
90. APPROVAL_LIMIT_CURRENCY	USER_GROUP	Yes
91. DEFAULT_SELLER_COMPANY	BUYER_COMPANY	No
92. DEFAULT_SELLER_COMPANY	USER_CREATED_FOR	No
93. HOME_PAGE	BUYER_COMPANY	No
94. HOME_PAGE	USER_CURRENT	No
95. PO_NUMBER_LENGTH	BILL_TO_LOCATION	No
96. PO_NUMBER_LENGTH	BUYER_COMPANY	Yes
97. PO_NUMBER_PREFIX	BILL_TO_LOCATION	No
98. PO_NUMBER_PREFIX	BUYER_COMPANY	Yes
99. REQ_NUMBER_LENGTH	BILL_TO_LOCATION	No
100. REQ_NUMBER_LENGTH	BUYER_COMPANY	Yes
101. REQ_NUMBER_PREFIX	BILL_TO_LOCATION	No
102. REQ_NUMBER_PREFIX	BUYER_COMPANY	Yes
103. ROUNDING_METHOD	BUYER_COMPANY	No
104. BILL_TO_LOCATION	BUYER_COMPANY	Yes
105. BILL_TO_LOCATION	SELLER_COMPANY	Yes
106. BILL_TO_LOCATION	USER_CREATED_FOR	Yes
107. DEFAULT_CONTACT_BILLTO	BILL_TO_LOCATION	No
108. DEFAULT_CONTACT_BILLTO	BUYER_COMPANY	Yes
109. DEFAULT_CONTACT_BILLTO	SELLER_COMPANY	Yes
110. DEFAULT_CONTACT_PAYTO	PAY_TO_LOCATION	Yes
111. DEFAULT_CONTACT_PAYTO	SELLER_COMPANY	Yes
112. PAY_TO_LOCATION	SELLER_COMPANY	Yes
113. PAYMENT_METHOD	BUYER_COMPANY	Yes
114. PAYMENT_METHOD	SELLER_COMPANY	Yes

Table 4-1 BuyerXpert 3.x Rules Migration Status *(Continued)* (5 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
115. PAYMENT_METHOD	USER_CREATED_FOR	Yes
116. PAYMENT_METHOD_MODEL	BUYER_COMPANY	No
117. PAYMENT_METHOD_MODEL	SELLER_COMPANY	No
118. PAYMENT_METHOD_MODEL	USER_CREATED_FOR	No
119. PAYMENT_TERMS_ID	BILL_TO_LOCATION	Yes
120. PAYMENT_TERMS_ID	BUYER_COMPANY	Yes
121. PAYMENT_TERMS_ID	SELLER_COMPANY	Yes
122. PAYMENT_TERMS_MODEL	BILL_TO_LOCATION	No
123. PAYMENT_TERMS_MODEL	BUYER_COMPANY	No
124. PAYMENT_TERMS_MODEL	SELLER_COMPANY	No
125. COMMON_CURRENCY	BILL_TO_LOCATION	No
126. COMMON_CURRENCY	BUYER_COMPANY	Yes
127. COMMON_CURRENCY	SELLER_COMPANY	No
128. COMMON_CURRENCY	USER_CREATED_FOR	Yes
129. COMMON_UNIT_OF_MEASURE	PRICELIST	No
130. COMMON_UNIT_OF_MEASURE	SELLER_COMPANY	No
131. COMMON_UNIT_OF_MEASURE_PRECISION	PRICELIST	No
132. COMMON_UNIT_OF_MEASURE_PRECISION	SELLER_COMPANY	No
133. CONVERTED_PRICE_PER_UNIT_PRECISION	BUYER_COMPANY	No
134. CONVERTED_PRICE_PER_UNIT_PRECISION	SELLER_COMPANY	No
135. CONVERTED_PRICE_PER_UNIT_PRECISION	USER_CURRENT	No
136. CURRENCY_CONVERSION_MODEL	BUYER_COMPANY	No
137. CURRENCY_CONVERSION_MODEL	USER_CURRENT	No
138. CURRENCY_CONVERSION_TABLE_ID	BILL_TO_LOCATION	No
139. CURRENCY_CONVERSION_TABLE_ID	BUYER_COMPANY	Yes
140. CURRENCY_CONVERSION_TABLE_ID	SELLER_COMPANY	Yes
141. MAX_DISCOUNT	BILL_TO_LOCATION	No
142. MAX_DISCOUNT	BUYER_COMPANY	Yes
143. MAX_DISCOUNT	SELLER_COMPANY	Yes

Table 4-1 BuyerXpert 3.x Rules Migration Status *(Continued)* (6 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
144. MAX_MARKUP	BILL_TO_LOCATION	No
145. MAX_MARKUP	BUYER_COMPANY	Yes
146. MAX_MARKUP	SELLER_COMPANY	Yes
147. PRICE_COLUMN_LOWEST_CHOICE	BUYER_COMPANY	Yes
148. PRICE_COLUMN_LOWEST_CHOICE	PRICELIST	No
149. PRICE_COLUMN_LOWEST_CHOICE	SELLER_COMPANY	Yes
150. PRICE_PER_UNIT_PRECISION	BUYER_COMPANY	No
151. PRICE_PER_UNIT_PRECISION	PRICELIST	No
152. PRICE_PER_UNIT_PRECISION	PRODUCT	No
153. PRICE_PER_UNIT_PRECISION	SELLER_COMPANY	No
154. PRICELIST	PRICE_LIST_PRODUCT	No
155. PRICELIST	SELLER_COMPANY	Yes
156. PRICELIST_COLUMN_LOOKUP	PRICE_LIST_PRODUCT	No
157. PRICELIST_COLUMN_LOOKUP	SELLER_COMPANY	Yes
158. PRICELIST_DEFAULT_COLUMN	SELLER_COMPANY	Yes
159. PRICELIST_DISCOUNT_MARKUP	SELLER_COMPANY	Yes
160. PRICING_ADJUSTMENT_SINGLE_RELATIONSHIP	PRICE_ADJS_PRODUCT	No
161. PRICING_ADJUSTMENT_SINGLE_RELATIONSHIP	PRICELIST	Yes
162. PRICING_ADJUSTMENT_SINGLE_RELATIONSHIP	PRODUCT	No
163. PRICING_ADJUSTMENT_SINGLE_RELATIONSHIP	SELLER_COMPANY	Yes
164. PRICING_ADJUSTMENT_SINGLE_RELATIONSHIP	SHIP_FROM_LOCATION	No
165. PRICING_ADJUSTMENT_SINGLE_RELATIONSHIP	SHIP_FROM_STATE	No
166. PROD_PRICING_MODEL	BILL_TO_LOCATION	No
167. PROD_PRICING_MODEL	BUYER_COMPANY	Yes
168. PROD_PRICING_MODEL	SELLER_COMPANY	Yes
169. PROD_PRICE_SELECTION	BUYER_COMPANY	No
170. PROD_PRICE_SELECTION	PRODUCT	No
171. PROD_PRICE_SELECTION	SELLER_COMPANY	No
172. REQUESTED_UNIT_OF_MEASURE	PRICELIST	No

Table 4-1 BuyerXpert 3.x Rules Migration Status (*Continued*) (7 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
173. REQUESTED_UNIT_OF_MEASURE	PRODUCT	No
174. REQUESTED_UNIT_OF_MEASURE	SELLER_COMPANY	No
175. MAX_WEIGHT_PRECISION	BUYER_COMPANY	No
176. MAX_WEIGHT_PRECISION	PRODUCT	No
177. MAX_WEIGHT_PRECISION	SELLER_COMPANY	Yes
178. PRODUCT_CATALOGS	BUYER_COMPANY	No
179. PRODUCT_CATALOGS	USER_CREATED_FOR	No
180. QUANTITY_PRECISION	BUYER_COMPANY	No
181. QUANTITY_PRECISION	PRODUCT	No
182. QUANTITY_PRECISION	SELLER_COMPANY	Yes
183. UNIT_CONVERSION_TABLE_ID	PRICELIST	No
184. UNIT_CONVERSION_TABLE_ID	PRODUCT	No
185. UNIT_CONVERSION_TABLE_ID	SELLER_COMPANY	No
186. UNIT_CONVERSION_TABLE_ID	UNIT_CONV_PRODUCT	No
187. GENERATE_1099	SELLER_COMPANY	No
188. MINORITY_VENDOR	SELLER_COMPANY	No
189. PARENT_COMPANY	SELLER_COMPANY	No
190. UNIT_CLASS	UNITCONV	No
191. ALLOW_CERT_LOGIN	BUYER_COMPANY	No
192. ALLOW_CERT_LOGIN	SELLER_COMPANY	No
193. ALLOW_CERT_LOGIN	USER_CURRENT	No
194. ALLOW_PASSWORD_LOGIN	BUYER_COMPANY	Yes
195. ALLOW_PASSWORD_LOGIN	SELLER_COMPANY	Yes
196. ALLOW_PASSWORD_LOGIN	USER_CURRENT	Yes
197. ALLOW_SELF_REGISTRATION	BUYER_COMPANY	No
198. ALLOW_SELF_REGISTRATION	SELLER_COMPANY	No
199. COMMON_UNIT_OF_WEIGHT	PRICELIST	No
200. COMMON_UNIT_OF_WEIGHT	SELLER_COMPANY	No
201. COMMON_UNIT_OF_WEIGHT_PRECISION	PRICELIST	No

Table 4-1 BuyerXpert 3.x Rules Migration Status *(Continued)* (8 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
202. COMMON_UNIT_OF_WEIGHT_PRECISION	SELLER_COMPANY	No
203. DEFAULT_CONTACT_SHIPFROM	SELLER_COMPANY	Yes
204. DEFAULT_CONTACT_SHIPFROM	SHIP_FROM_LOCATION	Yes
205. DEFAULT_CONTACT_SHIPTO	BUYER_COMPANY	Yes
206. DEFAULT_CONTACT_SHIPTO	SELLER_COMPANY	No
207. DEFAULT_CONTACT_SHIPTO	SHIP_TO_LOCATION	Yes
208. ESTIMATED_SHIP_DATE_CUTOFF_TIME	BUYER_COMPANY	No
209. ESTIMATED_SHIP_DATE_CUTOFF_TIME	SELLER_COMPANY	No
210. ESTIMATED_SHIP_DATE_CUTOFF_TIME	SHIP_FROM_LOCATION	No
211. ESTIMATED_SHIP_DATE_FRI	BUYER_COMPANY	No
212. ESTIMATED_SHIP_DATE_FRI	SELLER_COMPANY	No
213. ESTIMATED_SHIP_DATE_FRI	SHIP_FROM_LOCATION	No
214. ESTIMATED_SHIP_DATE_MODEL	BUYER_COMPANY	No
215. ESTIMATED_SHIP_DATE_MODEL	SELLER_COMPANY	No
216. ESTIMATED_SHIP_DATE_MODEL	SHIP_FROM_LOCATION	No
217. ESTIMATED_SHIP_DATE_MON	BUYER_COMPANY	No
218. ESTIMATED_SHIP_DATE_MON	SELLER_COMPANY	No
219. ESTIMATED_SHIP_DATE_MON	SHIP_FROM_LOCATION	No
220. ESTIMATED_SHIP_DATE_OFFSET	BUYER_COMPANY	No
221. ESTIMATED_SHIP_DATE_OFFSET	SELLER_COMPANY	No
222. ESTIMATED_SHIP_DATE_OFFSET	SHIP_FROM_LOCATION	No
223. ESTIMATED_SHIP_DATE_SAT	BUYER_COMPANY	No
224. ESTIMATED_SHIP_DATE_SAT	SELLER_COMPANY	No
225. ESTIMATED_SHIP_DATE_SAT	SHIP_FROM_LOCATION	No
226. ESTIMATED_SHIP_DATE_SUN	BUYER_COMPANY	No
227. ESTIMATED_SHIP_DATE_SUN	SELLER_COMPANY	No
228. ESTIMATED_SHIP_DATE_SUN	SHIP_FROM_LOCATION	No
229. ESTIMATED_SHIP_DATE_THU	BUYER_COMPANY	No
230. ESTIMATED_SHIP_DATE_THU	SELLER_COMPANY	No

Table 4-1 BuyerXpert 3.x Rules Migration Status (*Continued*) (9 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
231. ESTIMATED_SHIP_DATE_THU	SHIP_FROM_LOCATION	No
232. ESTIMATED_SHIP_DATE_TUE	BUYER_COMPANY	No
233. ESTIMATED_SHIP_DATE_TUE	SELLER_COMPANY	No
234. ESTIMATED_SHIP_DATE_TUE	SHIP_FROM_LOCATION	No
235. ESTIMATED_SHIP_DATE_WED	BUYER_COMPANY	No
236. ESTIMATED_SHIP_DATE_WED	SELLER_COMPANY	No
237. ESTIMATED_SHIP_DATE_WED	SHIP_FROM_LOCATION	No
238. FREIGHT_TERMS_ID	BUYER_COMPANY	Yes
239. FREIGHT_TERMS_ID	SELLER_COMPANY	Yes
240. FREIGHT_TERMS_ID	SHIPPING_METHOD	Yes
241. FREIGHT_TERMS_MODEL	BILL_TO_LOCATION	No
242. FREIGHT_TERMS_MODEL	BUYER_COMPANY	No
243. FREIGHT_TERMS_MODEL	SELLER_COMPANY	No
244. FREIGHT_TERMS_MODEL	SHIPPING_METHOD	No
245. ORDER_SPLIT_ALLOWED	BILL_TO_LOCATION	No
246. ORDER_SPLIT_ALLOWED	BUYER_COMPANY	No
247. ORDER_SPLIT_ALLOWED	SELLER_COMPANY	No
248. ORDER_SPLIT_MODEL	BILL_TO_LOCATION	No
249. ORDER_SPLIT_MODEL	BUYER_COMPANY	No
250. ORDER_SPLIT_MODEL	SELLER_COMPANY	No
251. SHIP_FROM_LOCATION	PRODUCT	No
252. SHIP_FROM_LOCATION	SELLER_COMPANY	Yes
253. SHIP_TO_LOCATION	BILL_TO_LOCATION	No
254. SHIP_TO_LOCATION	BUYER_COMPANY	Yes
255. SHIP_TO_LOCATION	SELLER_COMPANY	No
256. SHIP_TO_LOCATION	USER_CREATED_FOR	Yes
257. SHIPPING_CHARGE	SELLER_COMPANY	Yes
258. SHIPPING_CHARGE_MODEL	BUYER_COMPANY	No
259. SHIPPING_CHARGE_MODEL	SELLER_COMPANY	No

Table 4-1 BuyerXpert 3.x Rules Migration Status *(Continued)* (10 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
260. SHIPPING_CHARGE_MODEL	SHIP_FROM_LOCATION	No
261. SHIPPING_CHARGE_MODEL	SHIP_FROM_STATE	No
262. SHIPPING_LOCATION_TABLE_ID	SELLER_COMPANY	No
263. SHIPPING_LOCATION_TABLE_ID	SHIP_FROM_LOCATION	No
264. SHIPPING_METHOD	BUYER_COMPANY	Yes
265. SHIPPING_METHOD	SELLER_COMPANY	Yes
266. SHIPPING_METHOD	SHIP_TO_LOCATION	Yes
267. SHIPPING_METHOD_MODEL	BILL_TO_LOCATION	No
268. SHIPPING_METHOD_MODEL	BUYER_COMPANY	No
269. SHIPPING_METHOD_MODEL	SELLER_COMPANY	No
270. SHIPPING_POINT_SELECTION_MODEL	BUYER_COMPANY	No
271. SHIPPING_POINT_SELECTION_MODEL	PRODUCT	No
272. SHIPPING_POINT_SELECTION_MODEL	SELLER_COMPANY	No
273. SHIPPING_POINT_SELECTION_MODEL	SHIP_TO_LOCATION	No
274. SHIPPING_POINT_SELECTION_MODEL	SHIP_TO_STATE	No
275. CUSTOMER_TAX_CERTIFICATE_ID	BILL_TO_LOCATION	No
276. CUSTOMER_TAX_CERTIFICATE_ID	BUYER_COMPANY	Yes
277. CUSTOMER_TAX_CERTIFICATE_ID	SELLER_COMPANY	Yes
278. CUSTOMER_TAX_CERTIFICATE_ID	SHIP_TO_LOCATION	Yes
279. CUSTOMER_TAX_CERTIFICATE_ID	USER_CREATED_FOR	Yes
280. CUSTOMER_TAXABILITY	BILL_TO_LOCATION	No
281. CUSTOMER_TAXABILITY	BUYER_COMPANY	Yes
282. CUSTOMER_TAXABILITY	SELLER_COMPANY	Yes
283. CUSTOMER_TAXABILITY	SHIP_TO_LOCATION	Yes
284. CUSTOMER_TAXABILITY	USER_CREATED_FOR	Yes
285. PRODUCT_TAXABILITY	BUYER_COMPANY	Yes
286. PRODUCT_TAXABILITY	PRICELIST	No
287. PRODUCT_TAXABILITY	PRODUCT	No
288. PRODUCT_TAXABILITY	SELLER_COMPANY	Yes

Table 4-1 BuyerXpert 3.x Rules Migration Status *(Continued)* (11 of 11)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	Migrated?
289. TAX_ADJUSTMENT_ID	BUYER_COMPANY	Yes
290. TAX_ADJUSTMENT_ID	SELLER_COMPANY	Yes
291. TAX_ADJUSTMENT_ID	SHIP_TO_STATE	No
292. TAX_ADJUSTMENT_ID	TAX_PRODUCT_GROUP	No
293. TAX_ADJUSTMENT_MODEL	BUYER_COMPANY	Yes
294. TAX_ADJUSTMENT_MODEL	SELLER_COMPANY	Yes
295. TAX_ADJUSTMENT_MODEL	SHIP_TO_STATE	No
296. ESCALATION_MODEL	BUYER_COMPANY	Yes
297. ESCALATION_MODEL	USER_CURRENT	Yes
298. INVISIBLE_EMAIL_DELEGATOR	BUYER_COMPANY	No
299. INVISIBLE_EMAIL_DELEGATOR	USER_CURRENT	No
300. INVISIBLE_EMAIL_POOL	BUYER_COMPANY	No
301. INVISIBLE_EMAIL_POOL	USER_CURRENT	No
302. INVISIBLE_INBOX_DELEGATOR	BUYER_COMPANY	No
303. INVISIBLE_INBOX_DELEGATOR	USER_CURRENT	No
304. INVISIBLE_INBOX_POOL	BUYER_COMPANY	No
305. INVISIBLE_INBOX_POOL	USER_CURRENT	No
306. REMINDER_INTERVAL_MINUTES	BUYER_COMPANY	Yes
307. REMINDER_INTERVAL_MINUTES	USER_CURRENT	Yes
308. REMINDER_LIMIT	BUYER_COMPANY	Yes
309. REMINDER_LIMIT	USER_CURRENT	Yes
310. REMINDER_USE_CALENDAR	BUYER_COMPANY	Yes
311. REMINDER_USE_CALENDAR	USER_CURRENT	Yes
312. WORKFLOW_PURCHASE_APPROVAL_PROCESS	BUYER_COMPANY	No
313. WORKFLOW_PURCHASE_APPROVAL_PROCESS	ORGANIZATION_UNIT	No
314. WORKFLOW_PURCHASE_APPROVAL_PROCESS	USER_CURRENT	No

Table 4-2 lists the new BuyerXpert 4.x rules that are not populated by the Upgrade utility during the automated data migration. You must configure these rules before deploying your staging system.

Table 4-2 BuyerXpert 4.x Rules Not Populated by the Upgrade Utility

BuyerXpert 4.1 Rule Name	Populated by the Upgrade Utility?
Accounting Code Rules	
ACCNT_CODE_EXTAPI_SERVER	No
Additional Information Rules	
LINE_ITEM_ADDITION_INFO_STRUCT	No
Approval Rules	
APPROVAL_LIMIT	No
APP_MATRIX_TYPES	No
CAN_DELETE_APPROVER	No
CAN_ESCALATE_APPROVER	No
CAN_RECEIVE_EMAIL_NOTIFICATION	No
ESCALATION_MODEL	No
PURCHASE_APPROVAL_PROCESS_DEFAULT	No
REMINDER	No
Commodity Code Rules	
COMMODITY_CODE_MODEL	No
COMMODITY_CODE_EXTAPI_SERVER	No
COMMODITY_CODE_MAP_MODEL	No
COMMODITY_CODE_MAP_EXTAPI_SERVER	No
Company Rules	
SELLER_COMPANIES	No
Contract Rules	
CONTRACT_DEFAULT	No
CONTRACT_LIST	No
CONTRACT_ADMIN	No
Currency Rules	
CURRENCY_RATE_FREEZE_MODEL	No

Table 4-2 BuyerXpert 4.x Rules Not Populated by the Upgrade Utility (Continued)

BuyerXpert 4.1 Rule Name	Populated by the Upgrade Utility?
DISPLAY_CURRENCY_PRECISION	No
Discount Charge Rules	
GROUP_ADJUSTMENTS	No
LINE_ADJUSTMENTS	No
MAX_ADJ_LIMIT	No
Invoice Matching Rules	
INVOICE_MATCHING_ALGORITHM	No
ALLOWED_TO_PAY_INVOICE	No
PAYMENT_VOUCHER_CURRENCY	No
INVOICING_USER	No
Locale Rules	
PREFERRED_LOCALE	No
CONTACT_SENDTO_DEFAULT	No
CONTACT_SENDTO_LIST	No
Location Rule	
RECEIVING_TOLERANCE_PRECISION	No
CAN_RECEIVE	No
SEND_TO_LOCATION_DEFAULT	No
SEND_TO_LOCATION_LIST	No
Pricing Rules	
CAN_OVERRIDE_PRICE	No
PRICE_ADDITIONAL_PRECISION	No
Quality Entry Rule	
QUALITY_ENTRY_FORM	No
Receiving Rules	
RECEIVING_TOLERANCE	No
RECEIVING_TOLERANCE_PRECISION	No
CAN_RECEIVE	No
Security Rules	

Table 4-2 BuyerXpert 4.x Rules Not Populated by the Upgrade Utility (Continued)

BuyerXpert 4.1 Rule Name	Populated by the Upgrade Utility?
ALLOW_PASSWORD_LOGIN	No
CAN_SET_OWNER	No
Tax Rules	
TAX_CODE	No
GROUP_DCAP_TAX_TABLE	No
GROUP_FREIGHT_TAX_TABLE	No
Timecard Rules	
CAN_CREATE_TIMECARD	No
TIMECARD_APPROVAL_PROCESS_DEFAULT	No
Transmission Rules	
AUTO_SUBMIT	No
OBI_COMPLIANT	No
Unit Conversion Rules	
QUANTITY_CONVERSION_TABLE	No
WEIGHT_CONVERSION_TABLE	No

Table 4-3 shows the mapping of BuyerXpert 3.x rules and voters to BuyerXpert 4.x rules and roles.

Table 4-3 Mapping BuyerXpert 3.x Rules/Voter Type to BuyerXpert 4.1 Rules/Role (1 of 7)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	BuyerXpert 4.1 Rule Name	BuyerXpert 4.1 Role
1. ACCOUNTING_CODE_SEG (1-99)	BUYER_COMPANY	UDF_DEFAULT_VALUE	USER_CURRENT
2. ACCOUNTING_CODE_SEG (1-99)	USER_CREATED_FOR	UDF_DEFAULT_VALUE	USER_CURRENT
3. COMMODITY_CODE_SEG (1-99)	BUYER_COMPANY	UDF_DEFAULT_VALUE	USER_CURRENT
4. COMMODITY_CODE_SEG (1-99)	USER_CREATED_FOR	UDF_DEFAULT_VALUE	USER_CURRENT
5. DISPLAY_CURRENCY	BUYER_COMPANY	DISPLAY_CURRENCY_DEFAULT/LIST	USER_CURRENT
6. DISPLAY_CURRENCY	USER_CURRENT	DISPLAY_CURRENCY_DEFAULT/LIST	USER_CURRENT
7. XMIT_DOCUMENT_FORMAT	BUYER_COMPANY	XMIT_DOCUMENT:XMIT_DOCUMENT_FORMAT	USER_CREATED_FOR

Table 4-3 Mapping BuyerXpert 3.x Rules/Voter Type to BuyerXpert 4.1 Rules/Role *(Continued)* (2 of 7)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	BuyerXpert 4.1 Rule Name	BuyerXpert 4.1 Role
8. XMIT_DOCUMENT_FORMAT	SELLER_COMPANY	XMIT_DOCUMENT:XMIT_DOCUMENT_FORMAT	SEND_TO_LOCATION
9. XMIT_DOCUMENT_FORMAT	USER_CREATED_FOR	XMIT_DOCUMENT:XMIT_DOCUMENT_FORMAT	USER_CREATED_FOR
10. XMIT_DOCUMENT_TYPE	BUYER_COMPANY	XMIT_DOCUMENT:XMIT_DOCUMENT_TYPE	USER_CREATED_FOR
11. XMIT_DOCUMENT_TYPE	SELLER_COMPANY	XMIT_DOCUMENT:XMIT_DOCUMENT_TYPE	SEND_TO_LOCATION
12. XMIT_DOCUMENT_TYPE	USER_CREATED_FOR	XMIT_DOCUMENT:XMIT_DOCUMENT_TYPE	USER_CREATED_FOR
13. XMIT_DOCUMENT_VERSION	BUYER_COMPANY	XMIT_DOCUMENT:XMIT_DOCUMENT_VERSION	USER_CREATED_FOR
14. XMIT_DOCUMENT_VERSION	SELLER_COMPANY	XMIT_DOCUMENT:XMIT_DOCUMENT_VERSION	SEND_TO_LOCATION
15. XMIT_DOCUMENT_VERSION	USER_CREATED_FOR	XMIT_DOCUMENT:XMIT_DOCUMENT_VERSION	USER_CREATED_FOR
16. XMIT_RECEIVER_APP	BUYER_COMPANY	XMIT_RECEIVER:XMIT_RECEIVER_APP	USER_CREATED_FOR
17. XMIT_RECEIVER_APP	SELLER_COMPANY	XMIT_RECEIVER:XMIT_RECEIVER_APP	SEND_TO_LOCATION
18. XMIT_RECEIVER_APP	USER_CREATED_FOR	XMIT_RECEIVER:XMIT_RECEIVER_APP	USER_CREATED_FOR
19. XMIT_RECEIVER_APP_QUALIFIER	BUYER_COMPANY	XMIT_RECEIVER:XMIT_RECEIVER_APP_QUALIFIER	USER_CREATED_FOR
20. XMIT_RECEIVER_APP_QUALIFIER	SELLER_COMPANY	XMIT_RECEIVER:XMIT_RECEIVER_APP_QUALIFIER	SEND_TO_LOCATION
21. XMIT_RECEIVER_APP_QUALIFIER	USER_CREATED_FOR	XMIT_RECEIVER:XMIT_RECEIVER_APP_QUALIFIER	USER_CREATED_FOR
22. XMIT_RECEIVER_ID	BUYER_COMPANY	XMIT_RECEIVER:XMIT_RECEIVER_ID	USER_CREATED_FOR
23. XMIT_RECEIVER_ID	SELLER_COMPANY	XMIT_RECEIVER:XMIT_RECEIVER_ID	SEND_TO_LOCATION
24. XMIT_RECEIVER_ID	USER_CREATED_FOR	XMIT_RECEIVER:XMIT_RECEIVER_ID	USER_CREATED_FOR
25. XMIT_RECEIVER_ID_QUALIFIER	BUYER_COMPANY	XMIT_RECEIVER:XMIT_RECEIVER_ID_QUALIFIER	USER_CREATED_FOR
26. XMIT_RECEIVER_ID_QUALIFIER	SELLER_COMPANY	XMIT_RECEIVER:XMIT_RECEIVER_ID_QUALIFIER	SEND_TO_LOCATION
27. XMIT_RECEIVER_ID_QUALIFIER	USER_CREATED_FOR	XMIT_RECEIVER:XMIT_RECEIVER_ID_QUALIFIER	USER_CREATED_FOR
28. XMIT_SENDER_APP	BUYER_COMPANY	XMIT_SENDER:XMIT_SENDER_APP	USER_CREATED_FOR

Table 4-3 Mapping BuyerXpert 3.x Rules/Voter Type to BuyerXpert 4.1 Rules/Role *(Continued)* (3 of 7)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	BuyerXpert 4.1 Rule Name	BuyerXpert 4.1 Role
29. XMIT_SENDER_APP	SELLER_COMPANY	XMIT_SENDER:XMIT_SENDER_APP	SEND_TO_LOCATION
30. XMIT_SENDER_APP	USER_CREATED_FOR	XMIT_SENDER:XMIT_SENDER_APP	USER_CREATED_FOR
31. XMIT_SENDER_APP_QUALIFIER	BUYER_COMPANY	XMIT_SENDER:XMIT_SENDER_APP_QUALIFIER	USER_CREATED_FOR
32. XMIT_SENDER_APP_QUALIFIER	SELLER_COMPANY	XMIT_SENDER:XMIT_SENDER_APP_QUALIFIER	SEND_TO_LOCATION
33. XMIT_SENDER_APP_QUALIFIER	USER_CREATED_FOR	XMIT_SENDER:XMIT_SENDER_APP_QUALIFIER	USER_CREATED_FOR
34. XMIT_SENDER_ID	BUYER_COMPANY	XMIT_SENDER:XMIT_SENDER_ID	USER_CREATED_FOR
35. XMIT_SENDER_ID	SELLER_COMPANY	XMIT_SENDER:XMIT_SENDER_ID	SEND_TO_LOCATION
36. XMIT_SENDER_ID	USER_CREATED_FOR	XMIT_SENDER:XMIT_SENDER_ID	USER_CREATED_FOR
37. XMIT_SENDER_ID_QUALIFIER	BUYER_COMPANY	XMIT_SENDER:XMIT_SENDER_ID_QUALIFIER	USER_CREATED_FOR
38. XMIT_SENDER_ID_QUALIFIER	SELLER_COMPANY	XMIT_SENDER:XMIT_SENDER_ID_QUALIFIER	SEND_TO_LOCATION
39. XMIT_SENDER_ID_QUALIFIER	USER_CREATED_FOR	XMIT_SENDER:XMIT_SENDER_ID_QUALIFIER	USER_CREATED_FOR
40. APPROVAL_LIMIT	USER_GROUP	APPROVAL_LIMIT:AMOUNT	APPROVER
41. APPROVAL_LIMIT_CURRENCY	USER_GROUP	APPROVAL_LIMIT:CURRENC Y	APPROVER
42. PO_NUMBER_LENGTH	BUYER_COMPANY	LG_NUMBER:LENGTH	USER_CREATED_FOR
43. PO_NUMBER_PREFIX	BUYER_COMPANY	LG_NUMBER:PREFIX	USER_CREATED_FOR
44. REQ_NUMBER_LENGTH	BUYER_COMPANY	LG_NUMBER:LENGTH	USER_CREATED_FOR
45. REQ_NUMBER_PREFIX	BUYER_COMPANY	LG_NUMBER:PREFIX	USER_CREATED_FOR
46. PAYMENT_TERMS_ID	BILL_TO_LOCATION	PAYMENT_TERMS_DEFAULT /LIST	BILL_TO_LOCATION
47. PAYMENT_TERMS_ID	BUYER_COMPANY	PAYMENT_TERMS_DEFAULT /LIST	USER_CREATED_FOR
48. PAYMENT_TERMS_ID	SELLER_COMPANY	PAYMENT_TERMS_DEFAULT /LIST	SELLER_COMPANY
49. BILL_TO_LOCATION	BUYER_COMPANY	BILL_TO_LOCATION_DEFAU LT/LIST	USER_CREATED_FOR
50. BILL_TO_LOCATION	SELLER_COMPANY	BILL_TO_LOCATION_DEFAU LT/LIST	SEND_TO_LOCATION

Table 4-3 Mapping BuyerXpert 3.x Rules/Voter Type to BuyerXpert 4.1 Rules/Role (Continued) (4 of 7)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	BuyerXpert 4.1 Rule Name	BuyerXpert 4.1 Role
51. BILL_TO_LOCATION	USER_CREATED_FOR	BILL_TO_LOCATION_DEFAULT/LIST	USER_CREATED_FOR
52. DEFAULT_CONTACT_BILLTO	BUYER_COMPANY	CONTACT_BILLTO_DEFAULT/LIST	USER_CREATED_FOR
53. DEFAULT_CONTACT_BILLTO	SELLER_COMPANY	CONTACT_BILLTO_DEFAULT/LIST	SEND_TO_LOCATION
54. DEFAULT_CONTACT_PAYTO	PAY_TO_LOCATION	CONTACT_PAYTO_DEFAULT/LIST	PAY_TO_LOCATION
55. DEFAULT_CONTACT_PAYTO	SELLER_COMPANY	CONTACT_PAYTO_DEFAULT/LIST	PAY_TO_LOCATION
56. PAY_TO_LOCATION	SELLER_COMPANY	PAYTO_LOCATION_DEFAULT/LIST	SEND_TO_LOCATION
57. PAYMENT_METHOD	BUYER_COMPANY	PAYMENT_SUBTYPE_DEFAULT/LIST:METHOD	USER_CREATED_FOR
58. PAYMENT_METHOD	SELLER_COMPANY	PAYMENT_SUBTYPE_DEFAULT/LIST:METHOD	SEND_TO_LOCATION
59. PAYMENT_METHOD	USER_CREATED_FOR	PAYMENT_SUBTYPE_DEFAULT/LIST:METHOD	USER_CREATED_FOR
60. COMMON_CURRENCY	BUYER_COMPANY	COMMON_CURRENCY	USER_CREATED_FOR
61. COMMON_CURRENCY	USER_CREATED_FOR	COMMON_CURRENCY	USER_CREATED_FOR
62. CURRENCY_CONVERSION_TABLE	BUYER_COMPANY	CURRENCY_CONVERSION_TABLE	USER_CREATED_FOR
63. CURRENCY_CONVERSION_TABLE	SELLER_COMPANY	CURRENCY_CONVERSION_TABLE	SELLER_COMPANY
64. MAX_DISCOUNT	BUYER_COMPANY	MAX_ADJ_LIMIT:MAX_LINE_DISCOUNT	USER_CREATED_FOR
65. MAX_DISCOUNT	SELLER_COMPANY	MAX_ADJ_LIMIT:MAX_LINE_DISCOUNT	PRODUCT
66. MAX_MARKUP	BUYER_COMPANY	MAX_ADJ_LIMIT:MAX_LINE_MARKUP	USER_CREATED_FOR
67. MAX_MARKUP	SELLER_COMPANY	MAX_ADJ_LIMIT:MAX_LINE_DISCOUNT	PRODUCT
68. PRICE_COLUMN_LOWEST_CHOICE	BUYER_COMPANY	PRICELIST:PRICE_COLUMN_LOWEST_CHOICE	PRODUCT
69. PRICE_COLUMN_LOWEST_CHOICE	SELLER_COMPANY	PRICELIST:PRICE_COLUMN_LOWEST_CHOICE	PRODUCT
70. PRICELIST	SELLER_COMPANY	PRICELIST:PRICELIST	PRODUCT
71. PRICELIST_COLUMN_LOOKUP	SELLER_COMPANY	PRICELIST:PRICELIST_COLUMN_LOOKUP	USER_CREATED_FOR

Table 4-3 Mapping BuyerXpert 3.x Rules/Voter Type to BuyerXpert 4.1 Rules/Role (Continued) (5 of 7)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	BuyerXpert 4.1 Rule Name	BuyerXpert 4.1 Role
72. PRICELIST_DEFAULT_COLUMN	SELLER_COMPANY	PRICELIST:PRICELIST_DEFAULT_COLUMN	PRODUCT
73. PRICELIST_DISCOUNT_MARKUP	SELLER_COMPANY	PRICELIST:DISCOUNT_MARKUP	SELLER_COMPANY
74. PRICING_ADJUSTMENT_SINGLE_RELATIONSHIP	PRICELIST	PRICE_ADJUSTMENTS	PRICELIST
75. PRICING_ADJUSTMENT_SINGLE_RELATIONSHIP	SELLER_COMPANY	PRICE_ADJUSTMENTS	PRODUCT
76. PROD_PRICING_MODEL	BUYER_COMPANY	PRICING_MODEL	USER_CREATED_FOR
77. PROD_PRICING_MODEL	SELLER_COMPANY	PRICING_MODEL	PRODUCT
78. MAX_WEIGHT_PRECISION	SELLER_COMPANY	WEIGHT_PRECISION	PRODUCT
79. QUANTITY_PRECISION	SELLER_COMPANY	QUANTITY_PRECISION	PRODUCT
80. ALLOW_PASSWORD_LOGIN	BUYER_COMPANY	ALLOW_PASSWORD_LOGIN	USER_CURRENT
81. ALLOW_PASSWORD_LOGIN	SELLER_COMPANY	ALLOW_PASSWORD_LOGIN	USER_CURRENT
82. ALLOW_PASSWORD_LOGIN	USER_CURRENT	ALLOW_PASSWORD_LOGIN	USER_CURRENT
83. DEFAULT_CONTACT_SHIPFROM	SELLER_COMPANY	CONTACT_SHIPFROM_DEFAULT/LIST	SHIP_FROM_LOCATION
84. DEFAULT_CONTACT_SHIPFROM	SHIP_FROM_LOCATION	CONTACT_SHIPFROM_DEFAULT/LIST	SHIP_FROM_LOCATION
85. DEFAULT_CONTACT_SHIPTO	BUYER_COMPANY	CONTACT_SHIPTO_DEFAULT/LIST	SHIP_FROM_LOCATION
86. DEFAULT_CONTACT_SHIPTO	SHIP_TO_LOCATION	CONTACT_SHIPTO_DEFAULT/LIST	SHIP_TO_LOCATION
87. FREIGHT_TERMS_ID	BUYER_COMPANY	FREIGHT_TERM_DEFAULT/LIST	USER_CREATED_FOR
88. FREIGHT_TERMS_ID	SELLER_COMPANY	FREIGHT_TERM_DEFAULT/LIST	SELLER_COMPANY
89. FREIGHT_TERMS_ID	SHIPPING_METHOD	FREIGHT_TERM_DEFAULT/LIST	SHIPPING_METHOD
90. SHIP_FROM_LOCATION	SELLER_COMPANY	SHIP_FROM_LOCATION_DEFAULT/LIST	SELLER_COMPANY
91. SHIP_TO_LOCATION	BUYER_COMPANY	SHIPTO_LOCATION_DEFAULT/LIST	USER_CREATED_FOR
92. SHIP_TO_LOCATION	USER_CREATED_FOR	SHIPTO_LOCATION_DEFAULT/LIST	USER_CREATED_FOR
93. SHIPPING_CHARGE	SELLER_COMPANY	GROUP_LEVEL_SHIPPING_CHARGE/ LINE_LEVEL_SHIPPING_CHARGE	SHIP_FROM_LOCATION

Table 4-3 Mapping BuyerXpert 3.x Rules/Voter Type to BuyerXpert 4.1 Rules/Role *(Continued) (6 of 7)*

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	BuyerXpert 4.1 Rule Name	BuyerXpert 4.1 Role
94. SHIPPING_METHOD	BUYER_COMPANY	SHIPPING_METHOD_DEFAULT/LIST	USER_CREATED_FOR
95. SHIPPING_METHOD	SELLER_COMPANY	SHIPPING_METHOD_DEFAULT/LIST	SELLER_COMPANY
96. SHIPPING_METHOD	SHIP_TO_LOCATION	SHIPPING_METHOD_DEFAULT/LIST	SHIP_TO_LOCATION
97. CUSTOMER_TAX_CERTIFICATE_ID	BUYER_COMPANY	CUSTOMER_TAXABILITY:CUSTOMER_TAX_CERTIFICATE_ID	USER_CREATED_FOR
98. CUSTOMER_TAX_CERTIFICATE_ID	SELLER_COMPANY	CUSTOMER_TAXABILITY:CUSTOMER_TAX_CERTIFICATE_ID	SHIP_FROM_LOCATION
99. CUSTOMER_TAX_CERTIFICATE_ID	SHIP_TO_LOCATION	CUSTOMER_TAXABILITY:CUSTOMER_TAX_CERTIFICATE_ID	SHIP_TO_LOCATION
100. CUSTOMER_TAX_CERTIFICATE_ID	USER_CREATED_FOR	CUSTOMER_TAXABILITY:CUSTOMER_TAX_CERTIFICATE_ID	USER_CREATED_FOR
101. CUSTOMER_TAXABILITY	BUYER_COMPANY	CUSTOMER_TAXABILITY:CUSTOMER_TAXABILITY	USER_CREATED_FOR
102. CUSTOMER_TAXABILITY	SELLER_COMPANY	CUSTOMER_TAXABILITY:CUSTOMER_TAXABILITY	SHIP_FROM_LOCATION
103. CUSTOMER_TAXABILITY	SHIP_TO_LOCATION	CUSTOMER_TAXABILITY:CUSTOMER_TAXABILITY	SHIP_TO_LOCATION
104. CUSTOMER_TAXABILITY	USER_CREATED_FOR	CUSTOMER_TAXABILITY:CUSTOMER_TAXABILITY	USER_CREATED_FOR
105. PRODUCT_TAXABILITY	BUYER_COMPANY	TAX:PRODUCT_TAXABILITY	USER_CREATED_FOR
106. PRODUCT_TAXABILITY	SELLER_COMPANY	TAX:PRODUCT_TAXABILITY	PRODUCT
107. TAX_ADJUSTMENT_ID	BUYER_COMPANY	TAX:TAX_TABLE	USER_CREATED_FOR
108. TAX_ADJUSTMENT_ID	SELLER_COMPANY	TAX:TAX_TABLE	PRODUCT
109. TAX_MODEL	BUYER_COMPANY	TAX:TAX_MODEL	USER_CREATED_FOR
110. TAX_MODEL	SELLER_COMPANY	TAX:TAX_MODEL	PRODUCT
111. ESCALATION_MODEL	BUYER_COMPANY	ESCALATION_MODEL	USER_CURRENT
112. ESCALATION_MODEL	USER_CURRENT	ESCALATION_MODEL	USER_CURRENT
113. REMINDER_INTERVAL_MINUTES	BUYER_COMPANY	REMINDER:REMINDER_INTERVAL_MINUTES	APPROVER
114. REMINDER_INTERVAL_MINUTES	USER_CURRENT	REMINDER:REMINDER_INTERVAL_MINUTES	APPROVER
115. REMINDER_LIMIT	BUYER_COMPANY	REMINDER:REMINDER_LIMIT	APPROVER

Table 4-3 Mapping BuyerXpert 3.x Rules/Voter Type to BuyerXpert 4.1 Rules/Role (Continued) (7 of 7)

BuyerXpert 3.x Rule Name	BuyerXpert 3.x Rule Voter Type	BuyerXpert 4.1 Rule Name	BuyerXpert 4.1 Role
116. REMINDER_LIMIT	USER_CURRENT	REMINDER:REMINDER_LIMIT	APPROVER

Migrating User Interface Customizations

The Upgrade utility does not migrate customizations that were made to a BuyerXpert 3.x system. You must manually migrate these customizations, which include the following types:

- User interface customizations made to BuyerXpert 3.x
- Customizations made to ECXpert Mercator maps.

ECXpert provides a standard set of Mercator Maps that has the same set of functionality as the maps provided with BuyerXpert 3.x. Refer to the *ECXpert Administration Guide* for instructions.

For more information about migrating BuyerXpert 3.x customizations to BuyerXpert 4.x, contact iPlanet Support at:

<http://www.iplanetcustomers.com>

Upgrading from BuyerXpert 4.0 to 4.1

This appendix describes how to upgrade the BuyerXpert 4.0 data store to BuyerXpert 4.1. No actual data migration occurs, because you are only upgrading the Oracle schema and adding new business rules.

NOTE This appendix only pertains to upgrading from BuyerXpert 4.0 to BuyerXpert 4.1. The preceding chapters in this manual describe how to migrate your BuyerXpert 3.x application and data to BuyerXpert 4.x.

It contains the following sections:

- Preserving BuyerXpert 4.0 Data
- Installing BuyerXpert 4.1
- Using the BuyerXpert 4.0 to 4.1 Upgrade Script

Preserving BuyerXpert 4.0 Data

This section provides an overview of how to preserve data from an existing BuyerXpert 4.0 instance when you upgrade from BuyerXpert 4.0 to BuyerXpert 4.1.

NOTE No actual data migration occurs when you upgrade from BuyerXpert 4.0 to 4.1. You are preserving data from a BuyerXpert 4.0 instance and upgrading the schema and business rules for BuyerXpert 4.1.

To upgrade your BuyerXpert 4.0 system to 4.1, you must complete the following tasks:

- Back up your existing BuyerXpert 4.0 data.
- Install BuyerXpert 4.1.
- Run the BuyerXpert 4.0 to 4.1 upgrade script.

Backing Up BuyerXpert 4.0 Data

Ensure that the following BuyerXpert 4.0 information is backed up:

- Oracle database
- LDAP directory data
- Staged update files
- User customizations

If you have a database administrator on site, the Oracle database will have its own backup schedule. You also need to coordinate the backup of LDAP directory data, import files, customization files, and staging files before you begin uninstalling BuyerXpert 4.0.

Shutting Down BuyerXpert 4.0

You must stop your BuyerXpert 4.0 instance before you can install BuyerXpert 4.1.

To shut down your BuyerXpert 4.0, stop the KIVA shell script:

```
% IWS-ROOT/ias/bin/KIVaes.sh stop
```

See the BuyerXpert *Installation Guide* Chapter 6, “Shutting Down and Installing BuyerXpert,” for more information about shutting down BuyerXpert 4.0.

Installing BuyerXpert 4.1

To install BuyerXpert 4.1, follow the instructions in the BuyerXpert 4.1 *Installation Guide*, chapter 4, “Installing BuyerXpert”.

Choose the standard BuyerXpert 4.1 installation, and on the Sample screen choose option “O” – No sample data. During this installation setup, BuyerXpert points to the same Oracle and LDAP data stores as BuyerXpert 4.0.

Using the BuyerXpert 4.0 to 4.1 Upgrade Script

You can run the BuyerXpert 4.0 to 4.1 upgrade script to preserve your existing BuyerXpert 4.0 data after completing the following tasks:

- Backing up your BuyerXpert 4.0 data
- Shutting down BuyerXpert 4.0
- Uninstalling BuyerXpert 4.0
- Installing BuyerXpert 4.1

The upgrade script updates the BuyerXpert 4.0 schema by adding new tables and new business rules from BuyerXpert 4.1. The upgrade script will prompt you for the following parameters:

- Database parameters for upgrading the schema.
- HTTP server parameters.
- BuyerXpert system administrator with permission to upgrade the business rules.

Table A-1 lists the 4.0 to 4.1 upgrade utility script parameters.

Table A-1 BuyerXpert 4.0 to 4.1 Upgrade Utility Script Parameters

4.0 to 4.1 Upgrade Utility Script Parameter	Definition
iAS root directory	Installation directory for iAS. For example: <code>/export/IPM60</code>
Oracle SID	The Oracle System Identifier (SID) for your BuyerXpert Oracle instance.
Database user name	User name BuyerXpert uses for your database.
Database password	Password for database user name.
Database default table space	Default database table space BuyerXpert uses (Example: TS01)
HTTP server host name	Host name of your BuyerXpert HTTP server
HTTP server port	Port for your BuyerXpert HTTP server.
Authentication user name	User name for sysadmin who has permission to update business rules.
Authentication user password	Password for authentication user.
Authentication user organization	Organization for authentication user.

Running the 4.0 to 4.1 Upgrade Script

To run the BuyerXpert 4.0 to 4.1 upgrade script, do the following:

1. Go to the iAS buyer directory:

```
% cd IAS-ROOT/buyer/bin
```

2. Run the upgrade script:

```
% ./upgrade_to_4.1.sh
```

3. Respond to the upgrade utility prompts.

The following sample upgrade session log is from a sample upgrade session. User responses are shown in **bold**.

```
BuyerXpert 4.0 to 4.1 schema and rules upgrade
  This script operates on existing 4.0 data
  You should have an existing 4.0 data installed
  You should have already backed this data up
  You should have already installed the BuyerXpert 4.1 program
  You will need the database username, password and SID information
  You will need the database default tablespace name
  You will need to specify the base location of the iAS install
  Do you wish to continue?[yes/no] yes
Please enter the iAS installation root directory: /export/IPM60
Enter the ORACLE_SID [MYSID]: MYSID
Please enter database user name: bx4
Please enter database user password: bx4
Please enter database default tablespace: TS01
#####
##   Begin Schema Upgrade
#####
Schema for contract
SQL*Plus: Release 8.1.6.0.0 - Production on Fri Feb 16 09:12:54 2001
(c) Copyright 1999 Oracle Corporation. All rights reserved.
Connected to:
Oracle8i Enterprise Edition Release 8.1.6.0.0 - Production
With the Partitioning option
```

JServer Release 8.1.6.0.0 - Production

.
. .

#####

End Schema Upgrade

#####

Please enter HTTP Server host name: **myhost**

Please enter HTTP Server port: **8080**

Please enter the authentication user name: **admin**

Please enter the authentication user password: **admin**

Please enter the authentication user org: **mercury.com**

#####

Begin Rules Upgrade

#####

http://robinhood:8080 admin admin mercury.com

set classpath

set command

```
/export/IPM60/ias/usr/java/bin/java -classpath \  
/export/IPM60/ias/classes/java/jdbc20.jar:\  
/export/IPM60/ias/classes/java:/lib/classes.zip:\  
/export/IPM60/ias/classes/java/SWING.JAR:/export/IPM60/ias/APPS: \  
/lib/rt.jar:/export/IPM60/ias/./buyer/admin/lib/buyer4_admin.jar \  
com.iplanet.buyer.admin.impexp.cmdLn.impExpCmd \  
-u=http://robinhood:8080 -n=admin -p=admin -o=mercury.com \  
/export/IPM60/buyer/schema/db/buyer/4.0_to_4.1_policy.imp
```

```
#1 /export/IPM60/buyer/schema/db/buyer/4.0_to_4.1_policy.imp
```

To continue session press 'Enter' or ^C to cancel

<Press Enter>

Import session ID: DefUser:_2-16-01_8:07:16_AM_PST_949

To stop import file processing press 'Enter'

Total number of errors: 0

To get full results report press 'R'

To get only errors press 'O'

Attention!!! If literal pressed is uppercase session data will be removed from database

To get Log file press 'L'

To process another file press 'A'

To cancel application press ^C

<Use ^C to terminate the import/export utility>

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