

Concepts

iPlanet BuyerXpert

Version 4.5

June 2002

Copyright © 2002 Sun Microsystems, Inc. All rights reserved.

Sun, Sun Microsystems, the Sun logo, iPlanet, Java and Solaris are trademarks or registered trademarks of Sun Microsystems, Inc. in the United States and other countries.

Federal Acquisitions: Commercial Software—Government Users Subject to Standard License Terms and Conditions

The product described in this document is distributed under licenses restricting its use, copying, distribution, and decompilation. No part of the product or this document may be reproduced in any form by any means without prior written authorization of the Sun Microsystems, Inc. and its licensors, if any.

THIS DOCUMENTATION IS PROVIDED “AS IS” AND ALL EXPRESS OR IMPLIED CONDITIONS, REPRESENTATIONS AND WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, ARE DISCLAIMED, EXCEPT TO THE EXTENT THAT SUCH DISCLAIMERS ARE HELD TO BE LEGALLY INVALID.

Copyright © 2002 Sun Microsystems, Inc. Tous droits réservés.

Sun, Sun Microsystems, et Sun logo, iPlanet, Java et Solaris sont des marques de fabrique ou des marques déposées de Sun Microsystems, Inc. aux Etats-Unis et d'autre pays.

Le produit décrit dans ce document est distribué selon des conditions de licence qui en restreignent l'utilisation, la copie, la distribution et la décompilation. Aucune partie de ce produit ni de ce document ne peut être reproduite sous quelque forme ou par quelque moyen que ce soit sans l'autorisation écrite préalable de Sun Microsystems, Inc. et, le cas échéant, de ses bailleurs de licence.

CETTE DOCUMENTATION EST FOURNIE “EN L'ÉTAT”, ET TOUTES CONDITIONS EXPRESSES OU IMPLICITES, TOUTES REPRÉSENTATIONS ET TOUTES GARANTIES, Y COMPRIS TOUTE GARANTIE IMPLICITE D'APTITUDE À LA VENTE, OU À UN BUT PARTICULIER OU DE NON CONTREFAÇON SONT EXCLUES, EXCEPTÉ DANS LA MESURE OÙ DE TELLES EXCLUSIONS SERAIENT CONTRAIRES À LA LOI.

Contents

List of Figures	7
List of Tables	9
About This Document	11
Audience	11
What's in this Document	11
Documentation Conventions	12
Documentation	12
How to Use the Online Help	13
Product Support	13
How to Report Problems	13
Chapter 1 What Is iPlanet BuyerXpert?	15
iPlanet BuyerXpert Product Overview	15
iPlanet BuyerXpert Features	16
iPlanet BuyerXpert Architecture	17
OBI Interface	19
iPlanet BuyerXpert Interoperability with iPlanet Market Maker	20
iPlanet Market Maker Overview	20
iPlanet Market Maker Modules	21
iPlanet Market Maker Architecture	22
Interoperability Features	23
Key Benefits	24
Single Sign-On	24
Shared Membership and Catalog Data	24
Interoperability Architecture	24

Implementation	25
Configurable Approval Process	26
Access and Roles	26
ECXpert Interface	26
Customization Overview	27
Administrator-Level Customizations	27
Developer-Level Customizations	28
Chapter 2 How Does iPlanet BuyerXpert Work?	29
iPlanet BuyerXpert People	29
Users	29
<i>Typical buying sequence:</i>	29
Administrators	30
Administrator Roles for the Multi-Organizational Structure	30
Approvers	31
iPlanet BuyerXpert Components	32
Multi-Organizational Structure	32
Multi-Locale	32
Multi-Currency	33
Access Control	33
Privileges	34
Access to Resources	34
Membership	34
Organization	35
Organizational Unit	35
User	36
User Group	36
Location	36
Business Rules	37
Catalog Manager	37
Order Process	39
Contract Tracking	39
Blanket Purchase Orders	40
Archive/Restore Requisitions	40
Approval	41
Receiving	42
Supplier Performance	43
Invoice Matching	43
Timecard Process	44
Timecard Creation	44
Timecard Approval	44
Timecard Tracking	45
Timecard Transmission	45

Chapter 3 How Do I Use iPlanet BuyerXpert?	47
iPlanet BuyerXpert Tools	47
iPlanet BuyerXpert User Interface	48
Online Help for the User Interface	48
iPlanet BuyerXpert Administrative Interface	49
Organizations Tab	50
System Data Tab	52
Import/Export Tab	52
Online Help for the Administrative Interface	53
Process Manager Interface	54
iPlanet BuyerXpert Reports	55
Catalog Manager Interface	58
Installer Utility	60
 Glossary	 61
 Index	 73

List of Figures

Figure 1-1	BuyerXpert Architecture	18
Figure 1-2	OBI Process Flow	19
Figure 1-3	iPlanet Market Maker Architecture	22
Figure 1-4	Interoperability Architecture	25
Figure 3-1	iPlanet BuyerXpert User Interface	48
Figure 3-2	iPlanet BuyerXpert User Interface Help Contents Page	49
Figure 3-3	iPlanet BuyerXpert Organizations Tab for Superadmin	50
Figure 3-4	iPlanet BuyerXpert Administrative Interface for Orgadmins	51
Figure 3-5	iPlanet BuyerXpert System Data Tab	52
Figure 3-6	iPlanet BuyerXpert Import / Export Tab	53
Figure 3-7	iPlanet BuyerXpert Admin Interface Help Home Page	54
Figure 3-8	Process Manager Welcome Screen	55
Figure 3-9	Catalog Manager Welcome Screen	59

List of Tables

Table 3-1	iPlanet BuyerXpert User Reports	56
Table 3-2	iPlanet BuyerXpert Manager Reports	56
Table 3-3	iPlanet BuyerXpert Admin / Superadmin Reports	57

About This Document

This document provides a description of the basic components of the iPlanet BuyerXpert 4.5 product, including a functional overview and a high-level discussion of architecture and configuration.

This preface contains the following sections:

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

Audience

The audience for this document is any person who is involved in selecting, implementing, administering or working with the iPlanet BuyerXpert product.

What’s in this Document

The following list summarizes what each chapter covers.

If you want to know about this	See this chapter
Description of contents of this document; listing of documentation; information on product support	“About This Document”

If you want to know about this	See this chapter
Overview of the features, platform, infrastructure, and customization of iPlanet BuyerXpert; description of interoperability with iPlanet Market Maker.	“What Is iPlanet BuyerXpert?”
Overview of the how the users and applications of iPlanet BuyerXpert work	Chapter 2, “How Does iPlanet BuyerXpert Work?”
Description of the graphical interfaces, online help, reports, and utilities	Chapter 3, “How Do I Use iPlanet BuyerXpert?”
Product terminology	“Glossary”

Documentation Conventions

This document uses the following conventions:

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

Documentation

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

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

The iPlanet BuyerXpert documentation collection includes:

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

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

The following documentation contains additional information relevant to using the iPlanet BuyerXpert products:

- Actuate documentation (see the Actuate web site)
- *ECXpert Administration Guide*
- *ECXpert Operations Reference Manual*

How to Use the Online Help

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

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

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

Product Support

How to Report Problems

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

- iPlanet online support web site at:

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

From this location, the Online Support Center is available for logging problems.

The telephone dispatch number associated with your maintenance contract.

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

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

What Is iPlanet BuyerXpert?

iPlanet BuyerXpert is an internet-based purchasing system that allows enterprises to automate their procurement processes.

For the first time, interoperability between iPlanet BuyerXpert and the iPlanet marketplace framework product, iPlanet Market Maker, is available to customers of either iPlanet BuyerXpert or iPlanet Market Maker. An overview of this functionality is included in this chapter.

Together these two iPlanet products provide a solid base for implementation of an enterprise e-commerce solution.

This chapter includes the following topics:

- iPlanet BuyerXpert Product Overview
- iPlanet BuyerXpert Interoperability with iPlanet Market Maker
- ECXpert Interface
- Customization Overview

iPlanet BuyerXpert Product Overview

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

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

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

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

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

The main tasks in the iPlanet BuyerXpert procurement process are:

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

After a requisition is approved, iPlanet BuyerXpert generates the Purchase Order and electronically submits the purchase order to ECXpert which then sends it to the seller (or to multiple sellers, if the requisition is created this way).

iPlanet BuyerXpert Features

Key iPlanet BuyerXpert features include:

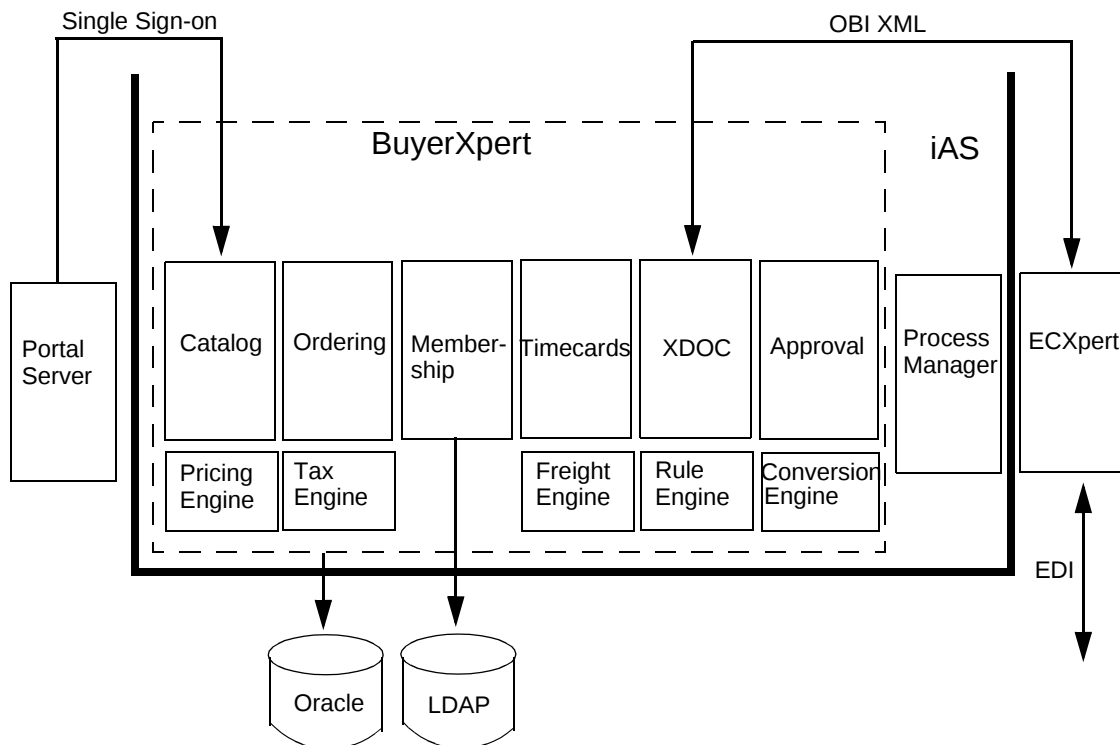
- Online seller catalogs
- Advanced search capabilities to quickly find goods in catalogs
- Automatic routing of requisitions and orders
- Contract tracking
- Blanket purchase orders for handling standing orders to suppliers

- Requisition archiving and restoring
- Notifications and reminders automatically sent by e-mail
- Fully configurable approval process
- Online tracking of purchase order status
- Invoice matching
- Receiving of goods ordered
- Seller performance tracking
- Extensive set of business rules for tailoring to an organization
- Reporting capabilities
- Import/Export utility (export of business rules)
- Installer utility
- EDI and OBI compliance
- Prebuilt portal channels
- Scalability to support buyer company future growth
- Internationalization (i18n) and localization (l10n) compliance—full multi-byte capability

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

iPlanet BuyerXpert Architecture

Figure 1-1 illustrates the BuyerXpert architecture.

Figure 1-1 BuyerXpert Architecture

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

- iPlanet Portal Server—Allows you to perform a single sign-on to iPlanet BuyerXpert, as well as a customized portal interface.
- iPlanet Application Server (iAS)—Processes transactions and is the primary engine of iPlanet BuyerXpert.
- iPlanet Process Manager—Handles the approval process, customizable to your organization.
- iPlanet ECXpert—Accepts inbound orders and transmits outbound orders and timecards. It is also used to accept communication from sellers.

- iPlanet Directory Server—The iPlanet implementation of LDAP that stores the membership and location data.
- Oracle—Database that stores the ordering and catalog information.

OBI Interface

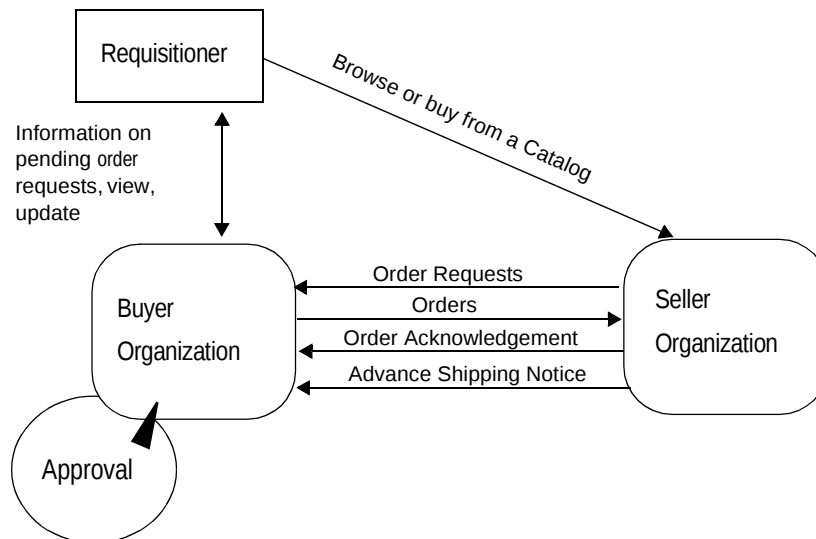
The Open Buying on the Internet (OBI) standard is an open, flexible framework for business-to-business internet commerce solutions. The purpose of the OBI specification is to provide a standard framework for secure and interoperable business-to-business internet commerce with an initial focus on automating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

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

- A requisitioner
- A buyer organization
- A seller organization

Figure 1-2 shows how these entities interact.

Figure 1-2 OBI Process Flow



iPlanet BuyerXpert Interoperability with iPlanet Market Maker

Market Maker is a software product that belongs to the suite of iPlanet e-commerce products. Until the 4.5 release, iPlanet BuyerXpert and iPlanet Market Maker operated separately, with no ability to navigate among the applications or share data. With the 4.5 release, interoperability has been implemented between iPlanet Market Maker and iPlanet BuyerXpert, allowing each product to use some of the strengths of the other product without having all the overhead of many logins and duplicate data management.

The following sections describe this interoperability:

- iPlanet Market Maker Overview
- Interoperability Features

iPlanet Market Maker Overview

The iPlanet Market Maker software enables organizations to establish and run complete digital marketplaces based on open standards. It is not a marketplace itself, but a rather platform that enables marketplaces.

Complemented by services delivered through external service providers in selected industries, iPlanet Market Maker is designed to help organizations rapidly build their own independent marketplaces. The external services (ESV) module acts as the XML messaging gateway for all the iPlanet Market Maker modules.

The iPlanet Market Maker software provides users with a range of functionality that can be used to:

- Aggregate supplier catalogs
- Initiate and run auctions
- Participate in online negotiations (RF*)
- Customize and deliver content to participants
- Offer business directories
- Provide sophisticated memberships and buying clubs

iPlanet Market Maker Modules

Order Management System (OMS)

The order management system (OMS) module provides a central point for requisition and order processing for all sources of iPlanet Market Maker business, including fixed price catalog sales, auctions, and negotiations (RFx).

Catalog and Pricing

Market makers can create and maintain a flexible catalog from all marketplace participants' catalog data, which is housed in an Oracle database. Customers can design custom catalog views, leveraging custom ontology or standards like the Universal Standard Products and Services Classification (UNSPSC).

Market Maker pricing allows seller companies to create and administer pricing rules. The Catalog module stores list prices, whereas the pricing engine dictates pricing rules.

Auction

The auction module supports multiple forward and reverse auction formats. Your customers can bid on auctions, with the final award resulting in a purchase order.

RFx Negotiation

The RFx module allows buyers to negotiate a purchase by creating a request for information (RFI), a request for proposal (RFP), or a request for quote (RFQ) for items, targeting one or more suppliers.

Community

The LDAP-based community module maintains service and security permissions for your marketplace through a single web-based interface. Customers can self register, administer their own marketplace presence, and delegate marketplace administration tasks across an entire organization.

Portal Manager

You can design custom portal views for your marketplace, plug in value-added content, and stream in syndicated content from third party providers.

Exchange

Buyers and sellers can asynchronously trade homogenous commodities using the exchange module. This functionality is especially useful when buying or selling items that are not physical products, such as shipping space.

External Services (ESV)

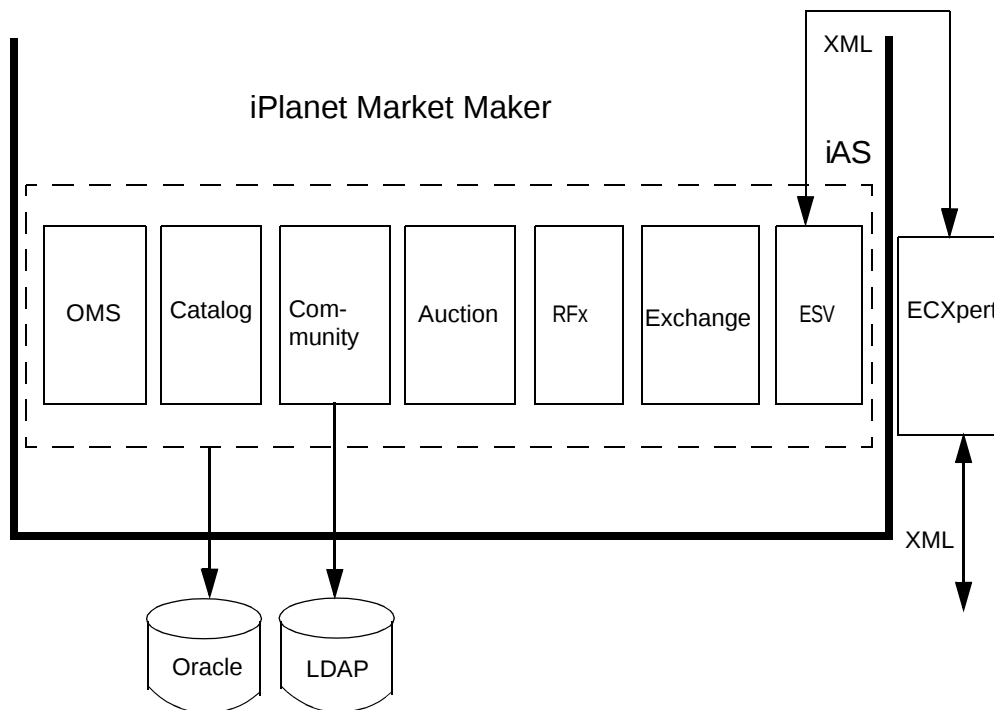
ESV is an external services framework that enables the iPlanet Market Maker OMS to transmit and receive documents that represent the business events in the life cycle of requisitions and orders.

Outbound documents go through ECXpert which supports many communication protocols, such as FTP, SMTP, and HTTP. Inbound documents come in exclusively through HTTP.

iPlanet Market Maker Architecture

Figure 1-3 illustrates the iPlanet Market Maker architecture.

Figure 1-3 iPlanet Market Maker Architecture



iPlanet Market Maker was designed to take advantage of strengths of various iPlanet products. Those products include:

- iPlanet Directory Server—The iPlanet implementation of LDAP that stores the membership and location data.
- iPlanet Application Server (iAS)—Processes transactions and is the primary engine of iPlanet BuyerXpert.
- Oracle—Database that stores the ordering and catalog information.
- ECXpert—Accepts inbound orders and transmits outbound orders and timecards. It is also used to accept communication from sellers.

Interoperability Features

Since iPlanet BuyerXpert and iPlanet Market Maker are both built on the iPlanet suite of products and use most of the same supporting software, the challenge of interoperability is in the navigation between the two functions and the transmission and sharing of data.

Duplicate functionality has been streamlined, which has resulted in the following changes to the existing products:

- The pricing and order management service (OMS) and pricing modules of iPlanet BuyerXpert take precedence over the OMS and pricing modules of iPlanet Market Maker. If you are configured for interoperability, the OMS and pricing modules aren't present in the iPlanet Market Maker portal.
- Requisitions created in the Market Maker modules (catalog, exchange, RFx, and auction) are transported to the iPlanet BuyerXpert OMS using external services (ESV) and ECXpert.
- All requisitions go through the iPlanet BuyerXpert approval process before becoming purchase orders.
- iPlanet BuyerXpert and iPlanet Market Maker share the same repositories for their membership / community and catalog data, specifically iPlanet Directory Server (LDAP-based) and Oracle.
 - iPlanet BuyerXpert and iPlanet Market Maker have identical catalogs.
 - iPlanet BuyerXpert and iPlanet Market Maker share the same membership; buyer and seller companies and their users are identical across the two applications.

Key Benefits

- iPlanet BuyerXpert users now have quick access to the iPlanet Market Maker dynamic commerce functions: Auction and RFx.
- iPlanet Market Maker has access to the robust iPlanet BuyerXpert OMS, with its requisition approval process.
- Duplication of data entry is eliminated by the sharing of the iPlanet Directory Server (LDAP) and Oracle databases. This also improves accessibility of data and ease of tracking.

Single Sign-On

You can log into either iPlanet BuyerXpert or iPlanet Market Maker and be able to access the interoperable functions. That is, logging into one application gives you access to the other. Some new buttons and additional screens have been added to facilitate transport between the two applications.

NOTE	Instructions for accessing and navigating the interoperability features are contained in the iPlanet BuyerXpert or iPlanet Market Maker online Help.
-------------	--

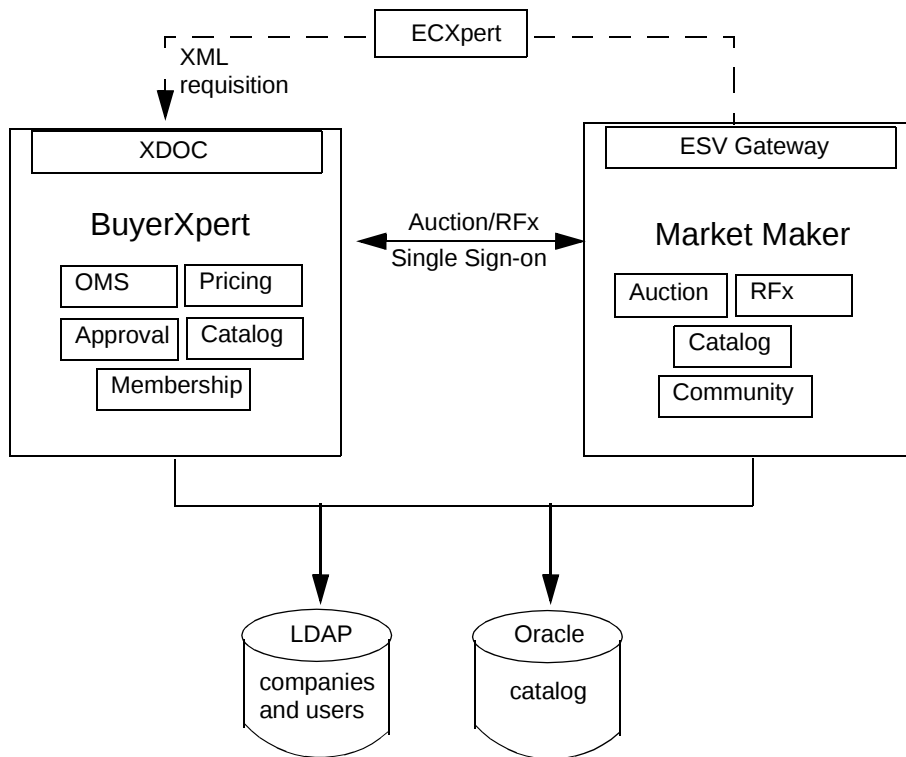
Shared Membership and Catalog Data

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

iPlanet BuyerXpert and iPlanet Market Maker also share the Oracle repository, specifically the catalog. This means that any catalog transactions that affect Oracle data are reflected from either the iPlanet BuyerXpert or iPlanet Market Maker screens.

Interoperability Architecture

Figure 1-4 illustrates the interoperability structure.

Figure 1-4 Interoperability Architecture

Implementation

When you install the iPlanet Market Maker 4.5, the Installer queries as to whether you want to cause iPlanet Market Maker to interoperate with iPlanet BuyerXpert. If so, enter the URL for iPlanet BuyerXpert using the format `http://hostname:port`. From this URL, the installer configures iPlanet Market Maker for interoperability with iPlanet BuyerXpert.

NOTE Full instructions are contained in the version 4.5 installation guides for iPlanet BuyerXpert and iPlanet Market Maker

If you have selected the interoperability configuration, the OMS and pricing modules of iPlanet Market Maker do not display when you start using the iPlanet Market Maker graphical interface. For interoperability, requisitions are actually created in iPlanet BuyerXpert and sent through the iPlanet BuyerXpert approval process.

NOTE Instructions for using the interoperable functions are contained in the iPlanet BuyerXpert and iPlanet Market Maker online Help.

During deployment of iPlanet BuyerXpert 4.5, you can customize the interoperability for your organization.

- Configurable approval process
- Access and roles

Configurable Approval Process

Two new APIs, `isRFx()` and `isAuction()`, have been added for workflow regarding interoperability. These APIs can be used in the workflow automation scripts like `calc_manager_approval` and `gatecheck` to customize the approval and gatecheck for requisitions created out of the interoperability process.

Access and Roles

RFx and Auction privileges are given to the BuyerXpert users through the permissions rules `CAN_CREATE_RFX` and `CAN_CREATE_AUCTIONS`. The RFx and Auction buttons appear in BuyerXpert for those users for whom the privilege is given through the above rules. In addition to these, RFx and Auction need to be enabled separately for the companies in iPlanet Market Maker.

ECXpert Interface

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

The interface with ECXpert allows the following:

- Support for the American National Standards Institute (ANSI) ASC X12 and other standards
- Use of a graphical tool for any-to-any mapping, and translation to convert any file format, such as Electronic Data Interchange (EDI), to any other file format

- Support for the Simple Mail Transfer Protocol (SMTP) and Secure Multipurpose Internet Mail Extensions (S/MIME)
- Storage of documents, tracking services, and management tasks
- Secure transmission of data over public and private networks
- Use of certified interfaces for Oracle applications
- Legacy integration, with batch scheduling, and robust communications capabilities to interface with mainframe operating systems, UNIX, or NT

NOTE	• Beginning with version 3.6.1, ECXpert was renamed as iPlanet Integration Server B2B edition. • For more information, refer to the iPlanet BuyerXpert <i>Administrator's Guide</i> in the ECXpert documentation collection.
-------------	---

Customization Overview

iPlanet BuyerXpert can be customized on two levels:

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

Administrator-Level Customizations

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

Typical administrator customizations include:

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

Developer-Level Customizations

Developer customizations can affect any part of the iPlanet BuyerXpert system.

Typical developer-level customizations include:

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

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

How Does iPlanet BuyerXpert Work?

The following sections are contained in this chapter:

- iPlanet BuyerXpert People
- iPlanet BuyerXpert Components

iPlanet BuyerXpert People

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

- Users
- Administrators
- Approvers

Users

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

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

Typical buying sequence:

1. A buyer logs into the web browser interface.

2. The buyer searches available catalogs and selects items to buy.
3. The buyer reviews selections and continues shopping.
4. The buyer begins the checkout process.
5. The buyer is prompted to confirm checkout; a message is displayed when the checkout is successful.

For iPlanet BuyerXpert, the requisition is electronically submitted for approval. After approval, it is submitted as an order to the seller.

6. The buyer can view order details and track the order.

Administrators

An administrator is an employee of the buyer organization that performs such administrative tasks as:

- Installing and upgrading the product
- Starting up and shutting down the systems and components
- Setting up access control to iPlanet BuyerXpert resources
- Defining the members within a buyer organization and assigning privileges associated with that organization
- Administering electronic catalogs
- Managing the iPlanet BuyerXpert data, including creating, updating, and deleting data using the graphical interfaces or Import / Export utility

Administrator Roles for the Multi-Organizational Structure

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

- *Systemadmin* (super administrator)—Can do all that is possible through the administrative utilities and interfaces of iPlanet BuyerXpert, including interactive administration and importing data. The superadmin has full create-read-update-delete privileges across organizations, and is responsible for giving the orgadmins their functional privileges. This role has no administrative restrictions.

- *Orgadmin* (organization administrator)—Can administer various resources within the domain of the orgadmin’s organization. An orgadmin has full create-read-update-delete privileges within an organization. The orgadmins in an organization are given functional privileges by the superadmin.
- *Selfadmin* (self administrator)—Can administer only self and self-related entities and attributes. This is the most restrictive role and is the default.

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

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

Approvers

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

The types of approvers are:

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

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

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

iPlanet BuyerXpert Components

The components that form the processing framework for are:

- Multi-Organizational Structure
- Access Control
- Membership
- Business Rules
- Catalog Manager
- Order Process
- Contract Tracking
- Approval
- Receiving
- Supplier Performance
- Invoice Matching
- Timecard Process

Multi-Organizational Structure

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

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

Multi-Locale

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

Locale settings include:

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

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

Multi-Currency

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

- Graphical interfaces
- Orders
- Reports

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

Access Control

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

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

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

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

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

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

Privileges

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

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

Access to Resources

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

NOTE	See the iPlanet BuyerXpert <i>Administrator's Guide</i> for more information on access and resources.
-------------	---

Membership

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

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

iPlanet BuyerXpert members are:

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

Organization

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

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

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

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

Organizational Unit

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

An organizational unit can have unique locations and catalogs.

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

User

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

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

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

User Group

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

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

User groups cannot be divided into sub-user groups.

Location

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

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

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

NOTE	See the resources chapters in the iPlanet BuyerXpert <i>Administrator's Guide</i> for more information.
-------------	---

Business Rules

Business rules are configurable, generalized statements that define the specifics of applying processing methods to a particular set of data. Business rules determine privileges, acceptable processes, relationships between iPlanet BuyerXpert participants, and defaults.

Business rules determine such things as:

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

The business rules semantics are not as complex as a full programming language, so programming expertise is not required to perform typical configurations.

Example

Rule instance named LINE_DISCOUNT:

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

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

NOTE	Refer to the online Help and the business rules chapter in the iPlanet BuyerXpert <i>Administrator's Guide</i> for more information.
-------------	--

Typically, business rules are configured during initial deployment of the iPlanet BuyerXpert software on a customer site. After implementing the business rules on a staging environment, a rules export utility can be used to transfer the organization-specific rules to a production environment. Once the business rules are active, the associated rules search facility in the Admin interface can be used to find rules associated with particular people, resources, or processes.

Catalog Manager

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

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

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

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

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

Catalog Manager enables the following:

- The administrator can create and maintain a standardized structure (master ontology) that maps catalog data to the iPlanet BuyerXpert environment.
- The administrator can manage catalog data using the Catalog Manager graphical interface or the batch process Import / Export utility.
- The administrator can create and manage group-specific buyer catalogs.
- The administrator can add items to seller catalogs and manage catalogs online.
- Users can perform advanced, keyword, and parametric searches on catalogs and perform side-by-side comparisons of items.
- Users can generate orders.

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

Order Process

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

The iPlanet BuyerXpert order process can be configured to:

- Create orders by browsing catalogs
- Create and manage blanket purchase orders awarded to particular suppliers
- Determine contract pricing with discounts, charges, allowances, and promotions
- Support contracted purchases
- Estimate freight charges based on shipping point and carrier selection
- Support credit and check (bank account) payment methods
- Search by full or partial shipment of goods
- View order status updates
- Archive and restore requisitions
- Support repeat order templates and multiple orders in progress
- Award discounts, commissions, allowances, or promotions (DCAPs)
- Elect to turn off rules you may not be using, such as freight, taxation, DCAPs

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

Contract Tracking

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

Blanket Purchase Orders

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

NOTE	You can tailor the approval process for the blanket purchase order to be different from your standard requisition approval process. It is common practice for blanket purchase orders to have a very strict approval process, while the subsequent requisitions against them may have a very simple approval process, or none.
-------------	--

After approval, the new blanket purchase order is sent to the supplier using ECXpert, and is available for buyers to order against until its limits expire.

The details of requisitions that have been created against the blanket purchase order and its expiration status can be viewed by the owner in the iPlanet BuyerXpert Track screen.

Information on creating, ordering, and tracking blanket purchase orders can be found in the online Help for the iPlanet BuyerXpert User interface and Admin interface.

Using the rules associated with blanket purchase orders, you can:

- Limit who can create blank purchase orders.
- Identify who is authorized to update another person's blanket purchase orders.
- Determine who should receive notifications, and in what situations.

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

Archive/Restore Requisitions

Over time, the requisition data in the iPlanet BuyerXpert database grows. This ultimately affects performance, particularly response time. These old records may no longer be needed for immediate access, in which case, they can be removed to an archival database where they are available for restoration if needed.

In the iPlanet BuyerXpert Admin interface, a Requisition Archive screen allows the administrator to select requisitions for archiving by specifying a date, a requisition number, or a range for either dates or requisition numbers. As the archive/restore process proceeds, the status is updated on the screen. The details of an archive/restore operation are logged to a text report. The location and level of detail of this report are configurable.

Each requisition is archived/restored in a transaction so the data integrity of the requisition is not compromised.

In the iPlanet BuyerXpert User interface, summary information for an archived requisition is displayed in the track screen of the user who created the requisition.

Instructions for using the requisition archival feature are contained in the iPlanet BuyerXpert Admin interface online Help.

Approval

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

NOTE	The approval process is implemented using the iPlanet Process Manager application. For further information on Process Manager, refer to the iPlanet Process manager documentation collection and the iPlanet BuyerXpert <i>Administrator's Guide</i> .
-------------	--

The approval process works like this:

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

- Commodity code associated with a product
- Other line item details
- Sends notification emails throughout the approval process.
- Delegates approval authority according to an approval delegation table.

Receiving

The iPlanet BuyerXpert receiving process provides the following capabilities:

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

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

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

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

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

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

NOTE	Further information can be found in the iPlanet BuyerXpert online Help and the iPlanet BuyerXpert <i>Administrator's Guide</i> .
-------------	--

Supplier Performance

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

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

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

Invoice Matching

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

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

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

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

Timecard Process

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

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

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

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

Timecard Creation

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

Timecard Approval

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

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

Timecard Tracking

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

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

Example

Shailesh Jones, Senior Consultant, Anderson Consulting

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

Some_menial_task RegularTime = 3, Price = \$180

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

Timecard Transmission

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

NOTE	Refer to the iPlanet BuyerXpert online Help and the iPlanet BuyerXpert <i>Administrator's Guide</i> for further information on timecards.
-------------	---

How Do I Use iPlanet BuyerXpert?

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

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

This chapter contains the following sections:

- iPlanet BuyerXpert Tools
- Catalog Manager Interface
- Installer Utility

iPlanet BuyerXpert Tools

The suite of tools provided with iPlanet BuyerXpert include:

- iPlanet BuyerXpert User Interface
- iPlanet BuyerXpert Administrative Interface
- Import/Export Tab
- Process Manager Interface
- iPlanet BuyerXpert Reports

iPlanet BuyerXpert User Interface

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

Figure 3-1 iPlanet BuyerXpert User Interface



Online Help for the User Interface

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

Figure 3-2 iPlanet BuyerXpert User Interface Help Contents Page

iPlanet BuyerXpert Administrative Interface

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

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

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

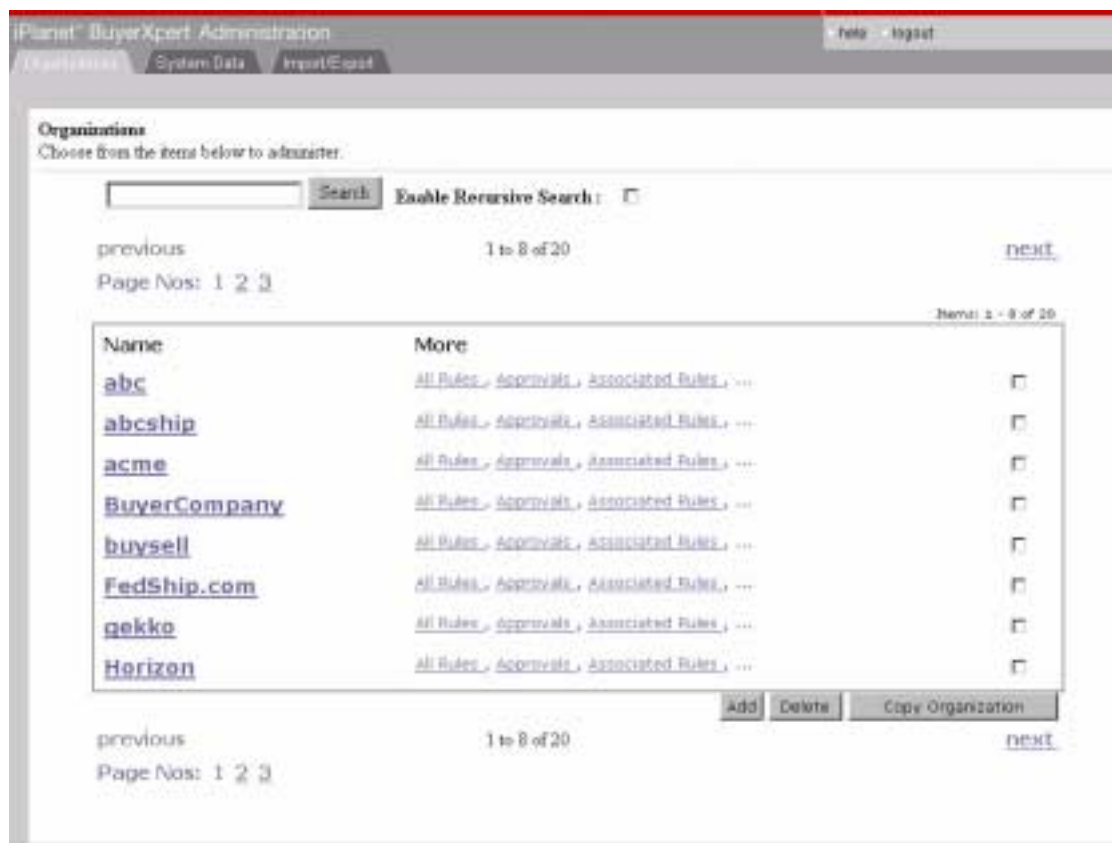
After you log into iPlanet BuyerXpert, a screen appears displaying three tabs:

- Organizations tab
- System Data tab
- Import/Export tab

Organizations Tab

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

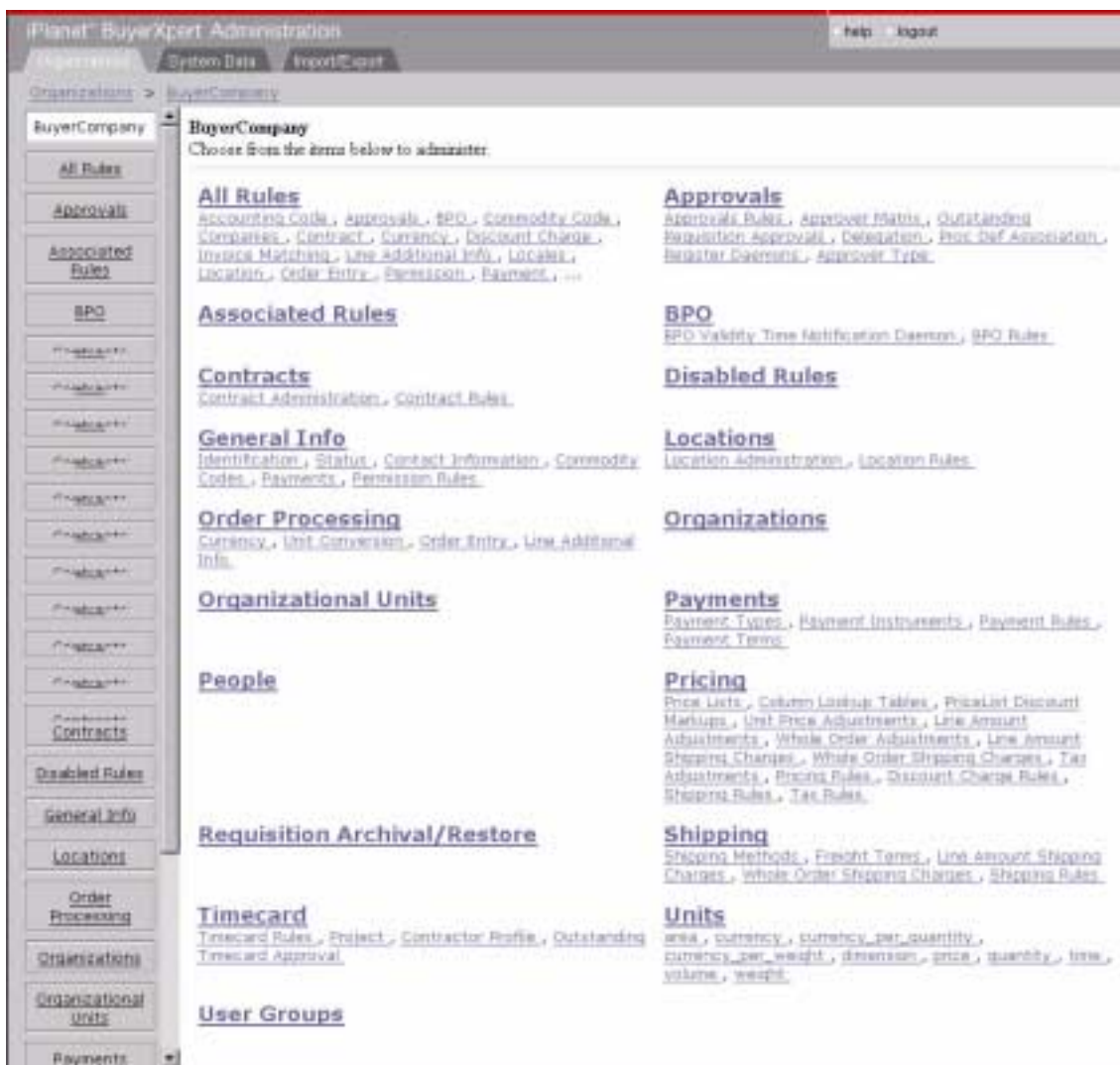
Figure 3-3 iPlanet BuyerXpert Organizations Tab for Superadmin



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

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

Figure 3-4 iPlanet BuyerXpert Administrative Interface for Orgadmins

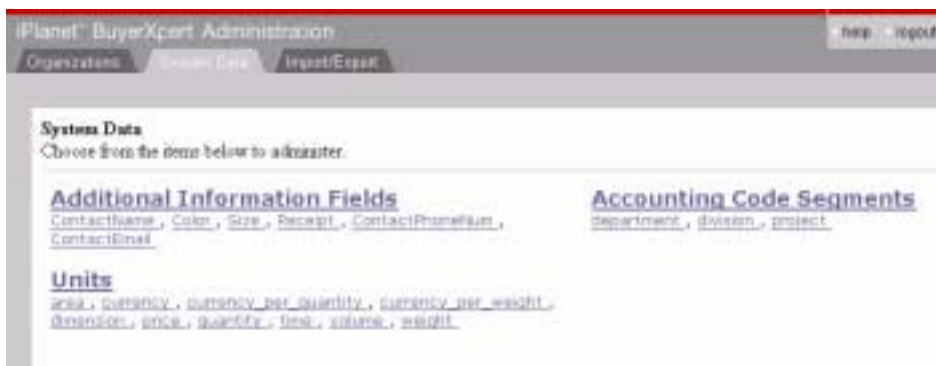


In this case, the orgadmin is logged directly into the screen for her organization. The links on this screen connect to categories for a specific organization, such as BuyerCompany.

System Data Tab

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

Figure 3-5 iPlanet BuyerXpert System Data Tab



Import/Export Tab

With the Import/Export tab, the administrator can use the Import/Export Utility rather than the administrative interface (organization and system data tabs).

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

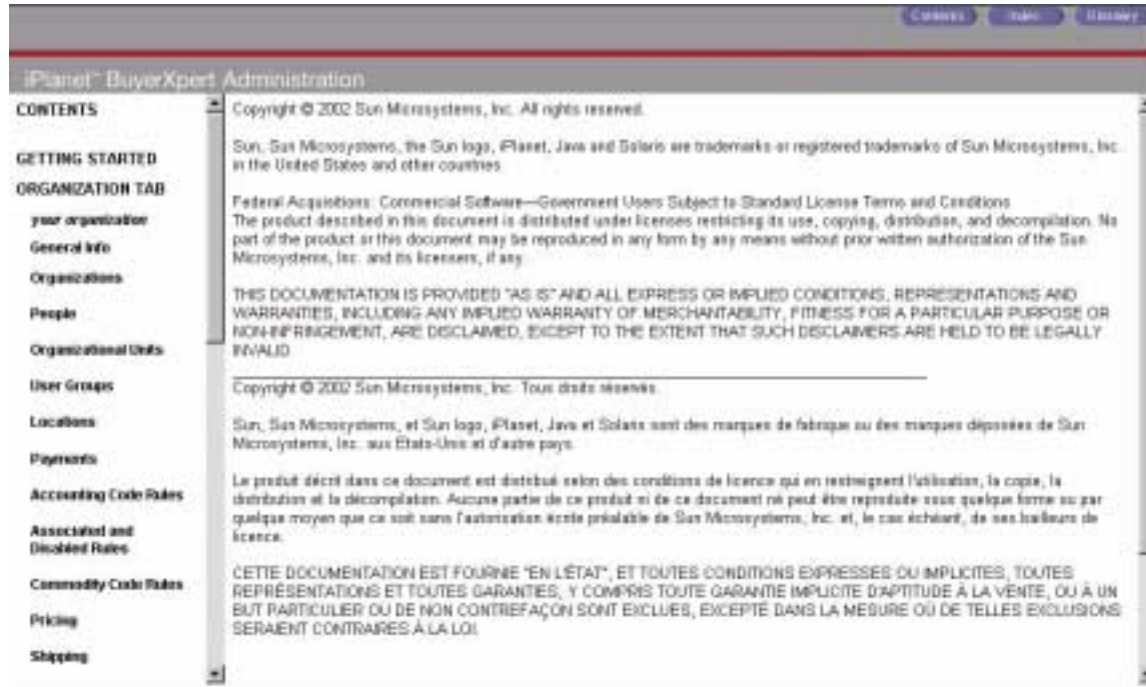
Figure 3-6 iPlanet BuyerXpert Import / Export Tab

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

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

Online Help for the Administrative Interface

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

Figure 3-7 iPlanet BuyerXpert Admin Interface Help Home Page

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

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

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

Process Manager Interface

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

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

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

Figure 3-8 Process Manager Welcome Screen



iPlanet BuyerXpert Reports

iPlanet BuyerXpert provides the following types of reports:

- User Reports
- Manager Reports
- Admin and Superadmin Reports

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

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

Table 3-1 iPlanet BuyerXpert User Reports

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

Table 3-2 iPlanet BuyerXpert Manager Reports

Report Category	Report Title
Requisitions	Requisitions by Employee
	Approved Requisitions
	Cancelled Requisitions
	Declined Requisitions
Spending	OrgUnit Vendor Spending

Table 3-3 iPlanet BuyerXpert Admin/Superadmin Reports

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

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

Report Category	Report Title
Spending Reports	Spending
	Org Unit Vendor Spending
	Spending by Costcenter
	Spending by Product
	Spending by Requisitioner
	Spending by Vendor
	Timecards Project Spend Report (Admin Reports only)
Other Reports	Item Summary Listing
	Large Purchase by Order
	Large Purchase by Item
	Small Purchase by Order
	Small Purchase by Item

Catalog Manager Interface

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

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

- Create catalogs—set up a new catalog
- Create classifications for catalog items
- Edit hierarchy
- Edit catalog items

The Catalog Manager welcome screen is shown in Figure 3-9.

Figure 3-9 Catalog Manager Welcome Screen

Installer Utility

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

Installer features:

- The Installer comes with a graphical interface, and can also be run from the command line.
- A single script is invoked to install iPlanet BuyerXpert.
- The Installer uses Setup SDK 5.0.
- iPlanet BuyerXpert is installed into a single directory schema; same root directory, similar sub-directory structure.
- The Installer is certified on the Solaris operating systems.

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

NOTE	For full instructions on using the Installer, refer to the version 4.5 installation guides for iPlanet BuyerXpert and iPlanet Market Maker.
-------------	---

Glossary

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

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

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

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

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

Admin interface *See* graphical Admin interface

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

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

API *See* Application Program Interface (API).

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

application server *See* iPlanet Application Server).

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

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

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

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

archive/restore requisition An iPlanet BuyerXpert feature that allows the administrator to move old requisition record to a separate database, thus improving performance. Archived requisitions are not longer accessible online, but they can be restored to the main database if needed.

Auction module An iPlanet Market Maker module that provides forward and reverse auction capability. Users can bid on auctions, with the final award resulting in a purchase order.

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

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

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

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

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

blanket purchase order An iPlanet BuyerXpert feature that allows a customer to issue a standing purchase order for an amount or time period to a particular a supplier. Users can order against a blanket purchase order until its limits are reached.

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

buyer A user who is a procurement professional.

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

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

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

catalog import/export utility A utility used for importing bulk catalog data offline using batch processing, and exporting business rules.

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

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

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

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

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

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

Community module The iPlanet Market Maker implementation of membership. *See* LDAP, membership.

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

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

currency conversion value *See* unit of currency.

customer ID A unique identification number for a customer organization.

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

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

Directory Server *See* iPlanet Directory Server, LDAP.

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

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

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

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

EDI *See* Electronic Data Interchange (EDI).

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

Exchange module An iPlanet Market Maker module allows buyers and sellers to asynchronously trade homogenous commodities. This functionality is particularly useful when buying or selling items that are not physical products, such as shipping space.

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

freight charges The actual charges for a shipment.

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

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

FOB *See* Freight on Board (FOB).

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

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

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

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

group *See* user group.

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

Import/Export utility Utility used for importing data to the product database using a batch process, or exporting business rules. The Import/Export utility provides both a graphical interface and a command-line interface.

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

interoperability A configuration that enables interoperability of the iPlanet BuyerXpert and iPlanet Market Maker software, highlighted by single sign-on and data sharing.

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

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

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

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

iPlanet Market Maker An iPlanet product that enables organizations to establish and run complete digital marketplaces based on open standards.

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

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

LDAP *See* Lightweight Directory Access Protocol (LDAP).

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

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

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

Market Maker *See* iPlanet Market Maker.

master catalog The total (aggregate) of all seller catalogs.

master ontology *See* catalog ontology.

measurement conversion value See unit of measure.

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

membership The information stored in the iPlanet Directory Server (LDAP) database on all members of the iPlanet BuyerXpert community. *See also* LDAP.

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

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

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

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

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

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

negotiation See RFX module.

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

ontology See catalog ontology.

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

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

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

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

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

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

parametric search Electronic search for items matching specific search parameters.

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

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

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

Portal Server *See* iPlanet Portal Server.

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

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

Process Manager *See* iPlanet Process Manager.

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

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

purchase order template *See order template.*

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

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

reorder requisition *See order template.*

repeat order *See order template.*

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

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

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

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

RFx module An iPlanet Market Maker module that allows buyers to negotiate a purchase by creating a request for information (RFI), a request for proposal (RFP), or a request for quote (RFQ) for items, targeting one or more suppliers.

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

rule *See business rule.*

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

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

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

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

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

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

single sign-on An aspect of iPlanet BuyerXpert and iPlanet Market Maker interoperability, single sign-on allows users to log in once, to either application, and be able to use the interoperable features without requiring another login.

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

SSL *See* Secure Sockets Layer (SSL).

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

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

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

supplier *See* seller.

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

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

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

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

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

user interface *See* graphical User interface.

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

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

vendor *See* seller.

XML *See* extensible markup language (XML).

Index

A

- access control 33
- administrator customizations 27
- administrator roles 30
- Application Server (iAS) 18, 23
- approval (BuyerXpert) 31
- approval features 41
- approver definition 31
- approver pool 31
- architecture
 - BuyerXpert 17
 - Market Maker 22
- archive/restore requisitions 40
- archived requisitions 39
- auction module (Market Maker) 21

B

- blanket purchase order 39, 40
- business rules 37
- buyer definition 36
- BuyerXpert
 - approval 31
 - architecture 17
 - archive/restore 40
 - blanket purchase order 40

- contract tracking 39
- features 16
- functionality 16
- invoice matching 43
- product overview 15
- receiving 42
- supplier performance 43
- timecards 44

C

- Catalog Manager 37, 58
- catalog module (Market Maker) 21
- community module (Market Maker) 21, 24
- contract tracking 39
- customization overview 27

D

- DCAPs 39
- developer customizations 28
- Directory Server 19, 23
- documentation 12

E

- ECXpert 18, 23, 26, 45
- ESV (Market Maker) 20, 22
- exchange module (Market Maker) 21
- export utility for rules 37
- external services (ESV) 22

H

- Help
 - how to use 13

I

- Installer utility 60
- interfaces
 - catalog manager 58
 - Installer utility 60
 - process manager 54
- interoperability 20, 23–26
- invoice matching 43
- iPlanet
 - Application Server (iAS) 18, 23
 - Directory Server 19, 23
 - ECXpert 18, 23, 45
 - Market Maker 20
 - Portal Server 18
 - Process Manager 18

L

- LDAP 19, 21, 23, 24
- locale settings 33
- localization 33
- location definition 36

M

- Market Maker overview 20–23
- membership 24, 34
- multi-currency definition 33
- multi-locale settings 33
- multi-org definition 32

O

- OBI 19
- OBI overview 19
- off-catalog approver 31
- online help 13
- Oracle 19, 23
- order process features 39
- orgadmin 31
- organization definition 35
- organizational unit definition 35
- overview
 - BuyerXpert 15
 - Market Maker 20

P

- portal module (Market Maker) 21
- Portal Server 18
- privileges, assigning 34
- Process Manager 18, 54

R

- receiving 42
- requisition archival 39
- requisition archive / restore 40
- resource definition 34
- restored requisitions 41
- RFx module (Market Maker) 21

rules overview 37
rules search 37

S

search for rules 37
security policy definition 33
selfadmin 31
single sign-on 24
superadmin 30
supplier performance 43

T

timecard process overview 44
tools for users 47–60

U

UNSPSC standards 21
user group definition 36
users
 administrator
 orgadmin 31
 selfadmin 31
 approver 31
 approver pool 31
 definition 36
 tools 47–60
utilities
 Import 52
 Installer 60

