JD Edwards EnterpriseOne

Portal Content Configuration Guide

Release 9.1.x

E21055-03

September 2012

ORACLE®

JD Edwards EnterpriseOne Portal Content Configuration Guide, Release 9.1.x

E21055-03

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Preface

Welcome to the JD Edwards EnterpriseOne Tools Portal Content Configuration Guide.

Note: This guide has been updated for JD Edwards EnterpriseOne Tools Release 9.1 Update 2. For details on documentation updates, refer to the *JD Edwards EnterpriseOne Tools Net Change Guide*.

Audience

This guide is intended for system administrators and technical consultants who are responsible for configuring portal content.

This guide assumes you have a working knowledge of the following:

- Setting up and configuring portals.
- The principles and customary practices of your business area.
- Computer desktop application usage and terminology.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc`.

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Related Documents

You can access related documents from the JD Edwards EnterpriseOne Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 876932.1, or by using this link:

`https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=876932.1`

To navigate to this page from the My Oracle Support home page, click the Knowledge tab, and then click the Tools and Training menu, JD Edwards EnterpriseOne, Welcome Center, Release Information Overview.

This guide contains references to server configuration settings that JD Edwards EnterpriseOne stores in configuration files (such as jde.ini, jas.ini, jdbj.ini, jdelog.properties, and so on). Beginning with the JD Edwards EnterpriseOne Tools Release 8.97, it is highly recommended that you only access and manage these settings for the supported server types using the Server Manager program. See the *Server Manager Guide*.

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Indicates field values.
Italics	Indicates emphasis and JD Edwards EnterpriseOne or other book-length publication titles.
`Monospace`	Indicates a JD Edwards EnterpriseOne program, other code example, or URL.

1 Introduction to Portals and Portlets

This chapter provides an overview of portals and portlets.

1.1 JD Edwards EnterpriseOne Portal Overview

A portal is a web destination that presents information and resources that are diverse in location, technology and derivation through a single point of entry. Content and technology that originate from widespread sources appear to your users as a cohesive set of information and services that are easily available from one location. For example, in a WebCenter Spaces portal, a user can look at all the Worklist items coming from their organization's business applications, the detailed customer information coming from a CRM suite, and the latest sales figure charts coming from a Business Intelligence tool. Despite these multiple sources, to your user, all of this content is available in one place and appears to be coming from a single source.

A portal is a customized solution for an organization with specialized content and a specific look and feel. Portal also provides authentication, authorization and administration tools.

An EnterpriseOne portal is a gateway that serves as a simple, unified access point to JD Edwards EnterpriseOne applications and can include one or more EnterpriseOne portlets. A portal delivers content and applications integrated with the JD Edwards EnterpriseOne system, and provides a collaborative workplace.

1.2 JD Edwards EnterpriseOne Portlets Overview

A Portlet can be considered as a miniature Web application that is running inside of a portal page along side any number of similar entities. A portlet is a web component which is managed by a portal and can process requests and generate dynamic content.

JD Edwards EnterpriseOne portlets are created using JD Edwards EnterpriseOne Forms Design Aid (FDA). These pre-built portlets allow employees to access JD Edwards EnterpriseOne information and complete tasks through a company intranet site or through the Internet. Many portlets allow personalization to make the interactive experience more efficient for the user.

EnterpriseOne also provide Configurable HTML portlets, which enable you to initialize a portlet to an existing portlet type or create a new portlet definition. In addition, when you initialize a configurable portlet, you define permissions to determine the type of access users have to the configurable portlet. You can grant either View or View, Config access. View permissions allow users to use a configurable portlet, but prevent them from modifying the definition of the portlet. View, Config permissions allow users to modify the definition and the permissions of a portlet. A user who has View, Config permissions basically has the same permissions of a system administrator. Therefore, you should carefully consider the users to which you grant View, Config permissions.

Many portlets are available that provide users with the ability to personalize content using the available functionality in JDE EnterpriseOne FDA portlets.

Resources

For more information on using JD Edwards EnterpriseOne Forms Design Aid to create JD Edwards EnterpriseOne portlets, see the *JD Edwards EnterpriseOne Tools Form Design Aid Guide*.

For more details about Configurable portlets refer to "Setting Up Viewable and Configurable Portlets" in this guide.

For more information on using JD Edwards EnterpriseOne portlets on WebCenter, see the *JD Edwards EnterpriseOne Tools Portal Reference for Oracle WebCenter Guide*.

For more information on using JD Edwards EnterpriseOne portlets on the JD Edwards Collaborative Portal, see the *JD Edwards EnterpriseOne Tools IBM WebSphere Portal Reference Guide*.

For more information on WebCenter administration, see the *Oracle Fusion Middleware Administrator's Guide for Oracle WebCenter 11g Release 1*.

2 Understanding ESS Portlets

This chapter contains the following topics:

- Section 2.1, "JD Edwards EnterpriseOne HCM Self-Service Overview"
- Section 2.2, "Understanding Self-Service Web Pages and Portlets"

2.1 JD Edwards EnterpriseOne HCM Self-Service Overview

The JD Edwards EnterpriseOne Human Capital Management (HCM) Self-Service system from Oracle allows employees to complete tasks online through a company intranet site. Self-service reduces the handling of documents between employees and the human resources department by allowing employees to access information, forms, and services online.

This section of the guide should be used in conjunction with the *JD Edwards EnterpriseOne Applications Human Capital Management Self-Service Implementation Guide*.

2.2 Understanding Self-Service Web Pages and Portlets

Employees access self-service through a series of web pages on your company intranet site that enable them to complete such tasks as requesting a verification of employment, changing name, address, or emergency contact information. In addition to employee functions, managers can also use the Manager's Workbench program (P08712) as a centralized location from which they can perform such tasks as changing employee status, personal self-service functions for managers, creation of delegates, and various reviews. These web pages correspond to self-service programs in your software.

JD Edwards EnterpriseOne software provides web pages for some self-service programs. These pages are fully functional and you can use them without modification. You can also create customized self-service web pages.

JD Edwards EnterpriseOne software provides these portlets to enable you to access self-service programs via web pages:

- HR - Employee Career
- HR - Manager Career
- HR - Delegates
- HR - Enhanced Employee Self Service
- HR - New Employee
- HR - Employee Performance Management

- HR - My Workforce
- HR - My Profile
- HR - Paid Time Off
- HR - Payment Review
- HR - Global Leave Administration
- HR - Time Entry
- HR - Global Leave Approvals
- HR - Payroll

These portlets are specialized forms that were created in Form Design Aid (FDA). You must use the eGenerator to generate these portlets in the WebClient_Portal.war file.

See "Generating JD Edwards EnterpriseOne Serialized Objects, Generating Selected Objects, Generating an FDA-Created Portlet" in *JD Edwards EnterpriseOne Tools HTML Server Installation*.

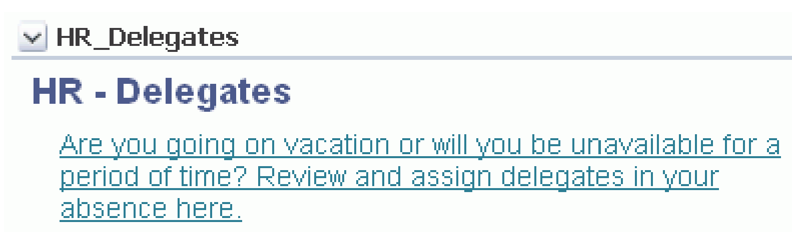
2.2.1 HR - Delegates (P05PTLET)

The HR - Delegates portlet enables an employee the ability to review and assign delegates in the event of the employee's absence. This table lists the link that is included on the HR - Delegates portlet and detail about the JD Edwards EnterpriseOne application that is associated with the link:

Link	Associated Application	Associated Form	Application Version
Are you going on vacation or will you be unavailable for a period of time? Review and assign delegates in your absence here.	Managers Delegates (P08750)	Work With Delegates (W08750A)	ZJDE0001

This is an image of the HR - Delegates portlet:

Figure 2–1 HR - Delegates portlet



2.2.2 HR - Employee Career (P05PTLET)

The HR - Employee Career portlet enables access to information regarding skills and competencies related to jobs within the organization. This table lists the links that are included on the HR - Employee Career portlet and detail about the JD Edwards EnterpriseOne applications that are associated with each link:

Link	Associated Application	Associated Form	Application Version
My skills and competencies	Competency Self Service (P05130)	Competency Self Service (W05130A)	ZJDE0001
Match my skills and competencies with what is required for my job or any other job	Competencies Gap Analysis (P08008)	Work with Employee Competency Gap Analysis (W08008A)	ZJDE0001
See all jobs in the organization	Jobs In An Organization (P08007)	Work With Jobs In An Organization (W08007A)	ZJDE0001
See the general skills and competencies expected from everyone and those specific to certain departments	Job Competencies In An Organization (P08006)	Work With Job Competencies In An Organization (W08006A)	ZJDE0001

This is an image of the HR - Employee Career portlet:

Figure 2–2 HR - Employee Career portlet

2.2.3 HR - Employee Performance Management (P05PTLET)

The HR - Employee Performance Management portlet enables tracking of dairy entries and appraisals. This table lists the links that are included on the HR - Employee Performance Management portlet and detail about the JD Edwards EnterpriseOne applications that are associated with each link:

Link	Associated Application	Associated Form	Application Version
Daily Diary Entries	Daily Diary (P087715)	Work With Diary Entries (W087715A)	ZJDE0001
Complete Self Appraisal	Employee Performance Appraisals (P087712)	Employee Work With Performance Appraisals (W087712E)	ZJDE0001

Link	Associated Application	Associated Form	Application Version
Review Current Appraisal	Employee Performance Appraisals (P087712)	Employee Work With Performance Appraisals (W087712E)	ZJDE0001
Review Historical Appraisal	Employee Performance Appraisals (P087712)	Employee Work With Performance Appraisals (W087712E)	ZJDE0001

This is an image of the HR - Employee Performance Management portlet:

Figure 2–3 HR - Employee Performance Management portlet

2.2.4 HR - Enhanced Employee Self Service (P05PTLET)

You can use the HR - Enhanced Employee Self Service to conduct benefits enrollment.

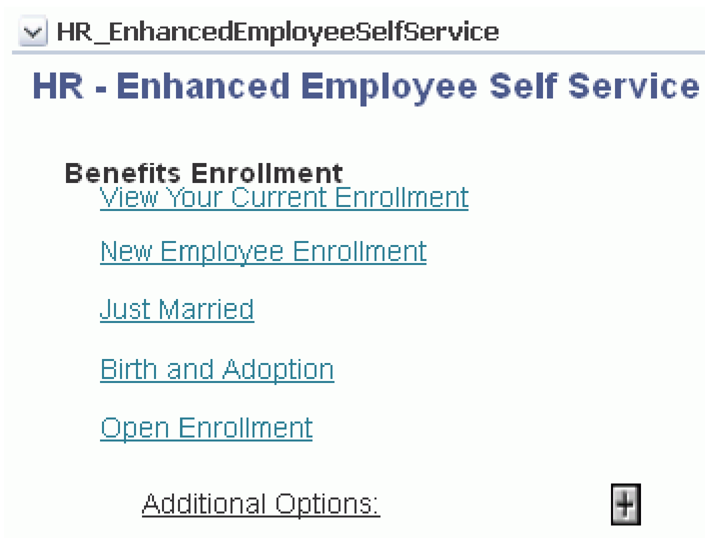
This table lists the links that are included on the HR - Enhanced Employee Self Service portlet and detail about the JD Edwards EnterpriseOne applications that are associated with each link:

Link	Associated Application	Associated Form	Application Version
View Your Current Enrollment	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0010
New Employee Enrollment	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0001
Just Married	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0002
Birth and Adoption	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0004
Open Enrollment	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0005
Moving	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0009
Change Your Beneficiaries	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0007

Link	Associated Application	Associated Form	Application Version
401(k) Enrollment	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0006
Employee Divorce	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0003
Dependent Death	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0008

This is an image of the HR - Enhanced Employee Self Service portlet:

Figure 2–4 HR - Enhanced Employee Self Service portlet



2.2.5 HR - eRecruit (P05PTLET)

The HR - eRecruit portlet, when initially displayed, provides a link to the eRecruit menu. When you click on this link, the portlet displays the eRecruit menu.

This table lists the links that are included on the eRecruit menu and detail about the JD Edwards EnterpriseOne applications that are associated with each link:

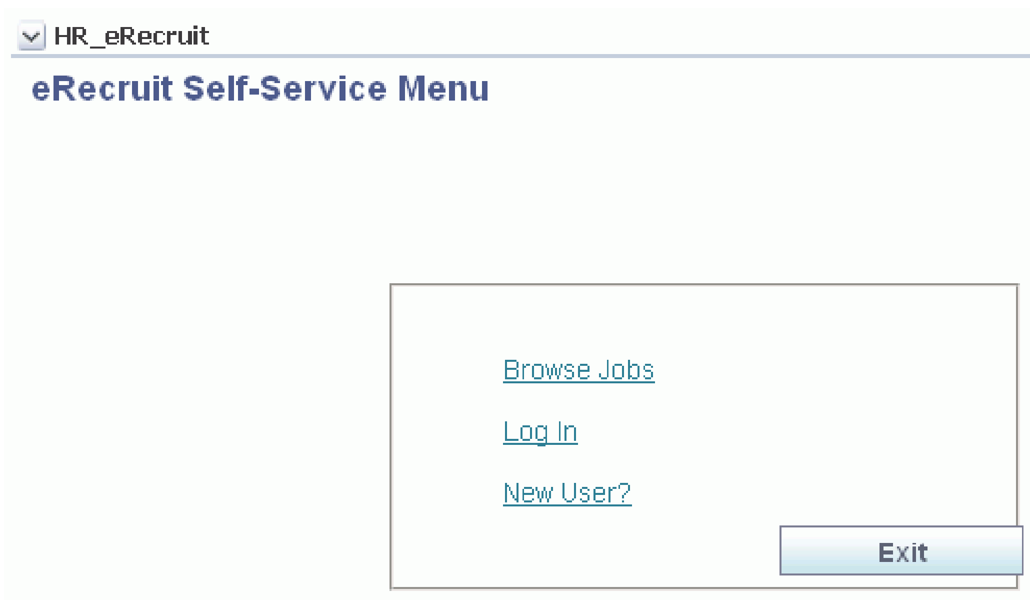
Link	Associated Application	Associated Form	Application Version
Browse Jobs	Browse Jobs (P08480)	Browse Jobs (W08480A)	ZJDE0001
View Job Basket	Job Basket (P08481)	Job Basket (W08481A)	ZJDE0001
View/Edit Personal Information	Recruitment Information (P08490)	Personal Information (W08490A)	ZJDE0001
View Submitted Applications	Submitted Applications (P08482)	Submitted Applications (W08482A)	ZJDE0001

This is an image of the HR - eRecruit portlet upon initial display:

Figure 2–5 HR - eRecruit portlet when initially displayed

This is an image of the HR - eRecruit portlet after the eRecruit Menu link has been clicked:

Figure 2–6 HR - eRecruity portlet displaying the eRecruit Self-Service Menu



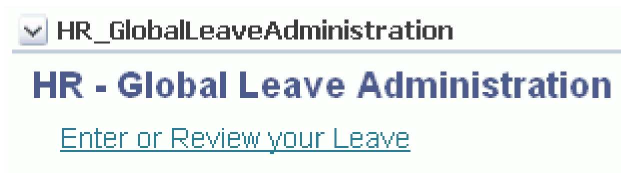
2.2.6 HR - Global Leave Administration (P07PTLET)

The HR - Global Leave Administration portlet enables one to enter or review their leave history. This table lists the link that is included on the HR - Global Leave Administration portlet and detail about the JD Edwards EnterpriseOne application that is associated with the link:

Link	Associated Application	Associated Form	Application Version
Enter or Review your Leave	Employee Self-Service Leave Planning And Request (P07620)	Leave Planning And Request Director (W07620A)	ZJDE0001

This is an image of the HR - Payment Review portlet:

Figure 2–7 HR - Global Leave Administration portlet



2.2.7 HR - Global Leave Approvals (P07PTLET)

The HR - Global Leave Approvals portlet enables a manager to review and approve leave requests. This table lists the link that is included on the HR - Global Leave Approvals portlet and detail about the JD Edwards EnterpriseOne application that is associated with the link:

Link	Associated Application	Associated Form	Application Version
Review and Approve Leave Requests	Manager Self Service Leave Review (P076311)	Manager Self Service Leave Review (W076311D)	ZJDE0001

This is an image of the HR - Global Leave Approvals portlet:

Figure 2–8 HR - Global Leave Approvals portlet

2.2.8 HR - Manager Career (P05PTLET)

The HR - Manager Career portlet provides information that enables an employee to manage their career opportunities. This table lists the links that are included on the HR - Manager Career portlet and detail about the JD Edwards EnterpriseOne applications that are associated with each link:

Link	Associated Application	Associated Form	Application Version
My skills and competencies	Competency Self Service (P05130)	Competency Self Service (W05130A)	ZJDE0001
Match my skills and competencies with requirements	Competencies Gap Analysis (P08008)	Work with Employee Competency Gap Analysis (W08008A)	ZJDE0001
See all jobs in the organization	Jobs In An Organization (P08007)	Work With Jobs In An Organization (W08007A)	ZJDE0001

Link	Associated Application	Associated Form	Application Version
Skills and competencies expected from everyone and those specific to certain departments	Job Competencies In An Organization (P08006)	Work With Job Competencies In An Organization (W08006A)	ZJDE0001

This is an image of the HR - Manager Career portlet:

Figure 2–9 HR - Manager Career portlet

2.2.9 HR - My Profile (P05PTLET)

The HR - My Profile portlet displays personal information about the employee who is logged on to the portal. The system retrieves the employee's name and address from the JD Edwards EnterpriseOne Address Book system. The system retrieves the job, department, and manager from the Employee Master Information table (F060116).

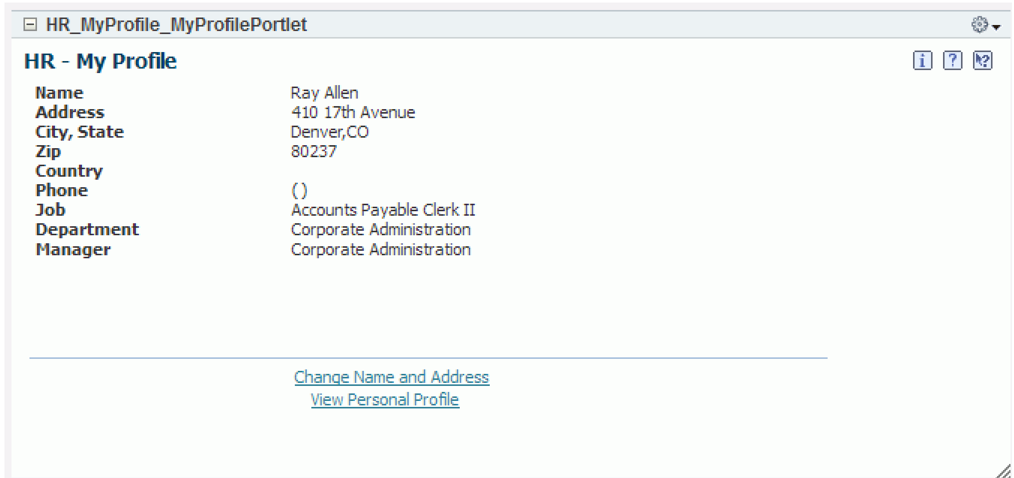
You set the processing options on the ZJDE0001 version of the Employee Self Service Portlets program (P05PTLET) to control which information appears on the portlet as well as which of the links appear.

This table lists the links that are included on the HR - My Profile portlet and detail about the JD Edwards EnterpriseOne applications that are associated with each link:

Link	Associated Application	Associated Form	Application Version
Change Name and Address	Self-Service Director (P05410)	Navigator (W05410C)	ZJDE0009
View Personal Profile	Employee Profile (P060116)	Employee Profile and Job Information (W060116C)	ZJDE0001

This is an image of the HR - My Profile portlet:

Figure 2–10 HR - My Profile portlet



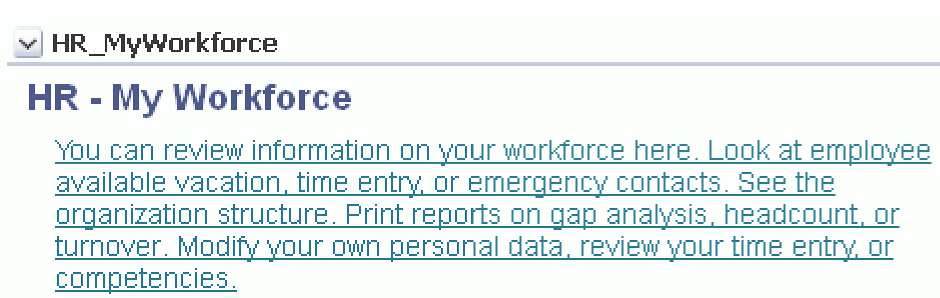
2.2.10 HR - My Workforce (P05PTLET)

The HR - My Workforce portlet provides managers with information about their workforce and organization. This table lists the link that is included on the HR - My Workforce portlet and detail about the JD Edwards EnterpriseOne application that is associated with the link:

Link	Associated Application	Associated Form	Application Version
You can review information on your workforce here. Look at employee available vacation, time entry, or emergency contacts. See the organization structure. Print reports on gap analysis, headcount, or turnover. Modify your own personal data, review your time entry, or competencies.	Manager's Workbench (P08712)	Work With Managers Employees (W08712A)	ZJDE0001

This is an image of the HR - My Workforce portlet:

Figure 2–11 HR - My Workforce portlet



2.2.11 HR - New Employee (P05PTLET)

The HR - New Employee portlet launches a workbench for employee setup. This table lists the link that is included on the HR - New Employee portlet and detail about the JD Edwards EnterpriseOne application that is associated with the link:

Link	Associated Application	Associated Form	Application Version
Setup for new employees	Employee Setup Workbench (P08710)	Work With Employee Setup (W08710C)	ZJDE0002

This is an image of the HR - New Employee portlet:

Figure 2–12 HR - New Employee portlet

2.2.12 HR - Paid Time Off (P05PTLET)

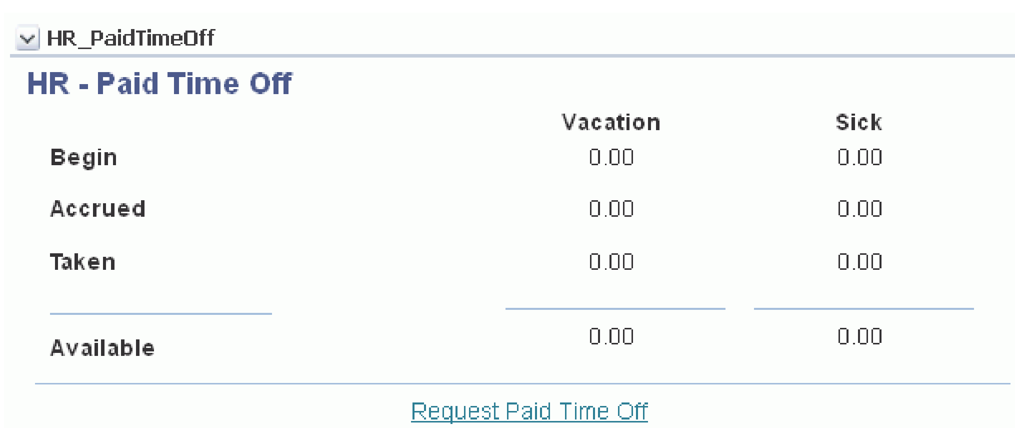
The HR - Paid Time Off portlet displays the current sick and vacation accruals for the employee who is logged on to the portal.

This table lists the link that is included on the HR - Paid Time Off portlet and detail about the JD Edwards EnterpriseOne application that is associated with the link:

Link	Associated Application	Associated Form	Application Version
Request Paid Time Off	Employee Self-Service Leave Planning And Request (P07620)	Leave Planning And Request Director (W07620A)	ZJDE0001

This is an image of the HR - Paid Time Off portlet:

Figure 2–13 HR - Paid Time Off portlet



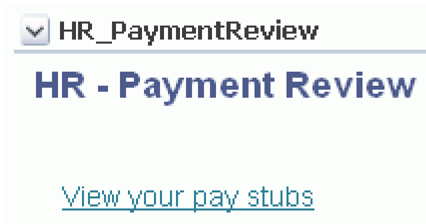
2.2.13 HR - Payment Review (P07PTLET)

The HR - Payment Review portlet enables an employee to review their pay stubs. This table lists the link that is included on the HR - Payment Review portlet and detail about the JD Edwards EnterpriseOne application that is associated with the link:

Link	Associated Application	Associated Form	Application Version
View your pay stubs	Stub Information History (P07186)	Work With Pay Stub History (W07186C)	ZJDE0001

This is an image of the HR - Payment Review portlet:

Figure 2–14 HR - Payment Review portlet



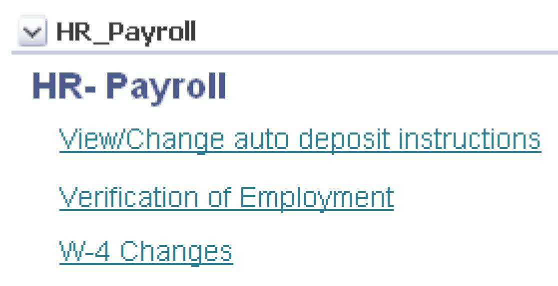
2.2.14 HR - Payroll (P07PTLET)

The HR - Payroll portlet provides payroll related information and services. This table lists the links that are included on the HR - Payroll portlet and detail about the JD Edwards EnterpriseOne applications that are associated with each link:

Link	Associated Application	Associated Form	Application Version
View/Change auto deposit instructions	Auto Deposit Instructions (P055011)	Revise Automatic Deposit Instructions (W055011A)	ZJDE0001
Verification of Employment	Review Requests for Verification Of Employment (P05003)	Work With Verification Of Employment Requests (W05003A)	ZJDE0001
W-4 Changes	IRS Form W-4, Employee's Withholding Allowance Certificate (P053030)	Work With Form W-4 (W053030A)	ZJDE0001

This is an image of the HR - Payroll portlet:

Figure 2–15 HR - Payroll portlet



2.2.15 HR - Time Entry (P07PTLET)

The HR - Time Entry portlet enables employee time entry. This table lists the link that is included on the HR - Time Entry portlet and detail about the JD Edwards EnterpriseOne application that is associated with the link:

Link	Associated Application	Associated Form	Application Version
Enter your Time	Time Entry Self Service Director (P051125)	Time Entry Self Service Director (W051125C)	ZJDE0001

This is an image of the HR - Time Entry portlet:

Figure 2–16 HR - Time Entry portlet

3

Understanding HCM Portlets

This chapter discusses HCM portlets that have been added for this release. This section of the guide should be used in conjunction with the *JD Edwards EnterpriseOne Applications Human Capital Management Self-Service Implementation Guide*.

3.1 Understanding the HCM Portlet

Six new HCM portlets have been added to this release. They are:

- Expiring Certifications
- Headcount
- Health & Safety Cases
- Overtime Report
- Time Attendance Trends
- Upcoming Reviews

3.1.1 HR - Expiring Certifications (P05114PT)

The Expiring Certifications portlet provides a tracking mechanism for certifications related to competency. This portlet displays certification information in a grid format with columns for:

- Alpha Name
- Competency
- Expiration Date

This portlet has two mode options based on its configuration:

- Supervisor

  When a user logs in to this version, the portlet will display Expiring Certifications for the Employees reporting to the logged in user.

- HR

  When an HR logs in, they will be able to see Expiring Certificates for all users/supervisors.

> **Note:** The HR mode has an additional Supervisor entry field on the portlet.

Expiring Certifications portlet considerations:

- No configuration option/preference will be provided to enter a supervisor's user ID.
- The option to configure the portlet in HR mode or Supervisor mode will be provided as a configuration option.
- The records will be first sorted based on the Expiration Date and then the User Name for the same Expiration Date.
- Clicking the Employee Name in a grid record will take the user to P05114 application and display the certification details.
- The Supervisor Search Box and Find button will be displayed ONLY in HR mode and will enable the HR to filter the records for a given supervisor.
- A visual assist will be provided for the Supervisor Search Box.

Figure 3–1 Expiring Certifications portlet in Supervisor mode

Alpha Name	Competency	Expiration Date
Thompson, Craig	Certified Public Accountant	03/01/2001
Edwards, Angela	Microsoft Certified	04/18/2001
McDougle, Cathy	Sr. Prof. in Human Resources	08/01/2001
Beck, Jeremy	Certified in Prod/Inv Mgmt.	12/22/2004
Mastro, Robert	Certified Payroll Professional	06/03/2005
Jane Flex	Certified Public Accountant	05/15/2006
Beck, Jeremy	OneWorld Certified	10/01/2006
Washington, Harold	Professnl. in Human Resources	09/10/2007

Figure 3–2 Expiring Certifications portlet in HR mode

Expiring Certifications

Supervisor * Find

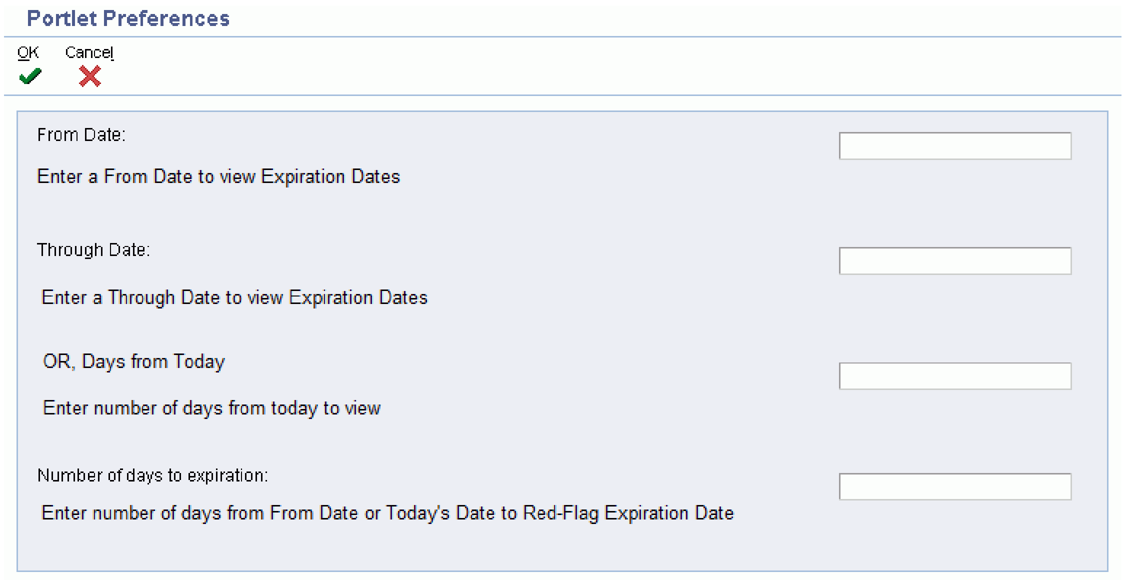
Records 1 - 9

Alpha Name	Competency	Expiration Date
Thompson, Craig	Certified Public Accountant	03/01/2001
Edwards, Angela	Microsoft Certified	04/18/2001
McDougle, Cathy	Sr. Prof. in Human Resourc...	08/01/2001
Beck, Jeremy	Certified in Prod/Inv Mgmt.	12/22/2004
Mastro, Robert	Certified Payroll Professional	06/03/2005
Jane Flex	Certified Public Accountant	05/15/2006
Beck, Jeremy	OneWorld Certified	10/01/2006
Washington, Harold	Professnl. in Human Reso...	09/10/2007
McDougle, Cathy	Certified in Prod/Inv Mgmt.	12/31/2014

Selecting the Personalize icon will enable parameters to be set for this portlet.

Selection	Value	Result
From Date	Enter a From Date to view Expiration Dates.	Displays Expiration Dates.
Through Date	Enter a Through Date to view Expiration Dates.	Displays Expiration Dates.
OR, Days from Today	Enter Number of days from today to view.	Displays number of days.
Number of days to expiration:	Number of days from From Date or Today's Date to Red-Flag Expiration Date.	Displays number of days to expiration.

Figure 3–3 Portlet Personalizations



3.1.2 HR - Headcount (P06401PT)

In this portlet, a bar chart will display each BU's FTE under a company. The bar chart will display three bars for each BU: Budgeted, Part Time Actual and Full Time Actual. Terminated employees are not be included. The x axis will display the BU and the y axis will display the headcount.

Headcount portlet considerations:

- A company will have to be mentioned in the Personalizations. If not mentioned, details for all BUs inside all companies will be displayed.
- It will not be feasible to ask for a list of BUs to be considered, therefore, such a personalization will not be provided.
- Only Employees (Search type E) will be included.
- A Portlet Preference will be provided to seek "Position Budget Fiscal year" from the user.
- Total of FTEs for all position for each BU will represent the Budgeted FTE.
- The current FTE will be compared against the Budgeted FTE.
- The preference for Position Budget Fiscal Year will display irrespective of whether the company uses Position Control.
- The Budgeted FTE Bar will be displayed ONLY if the company uses Position Control and a valid year is entered in the preference for the same.

Figure 3–4 Headcount Portlet

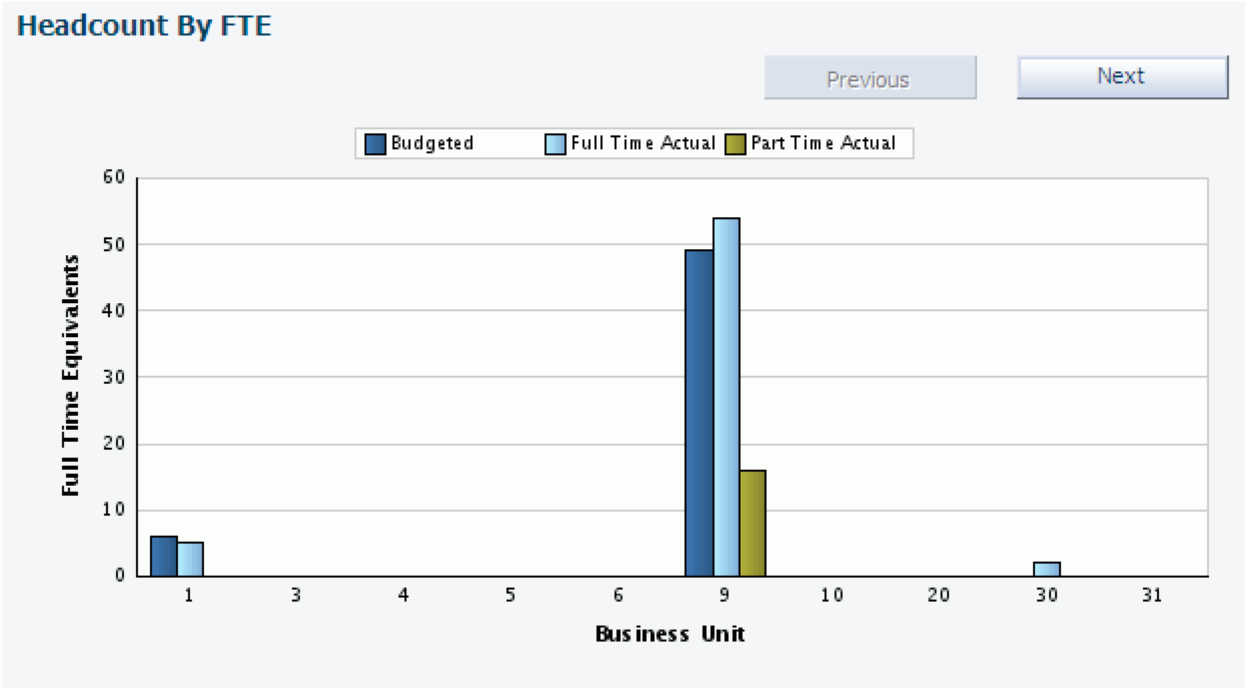
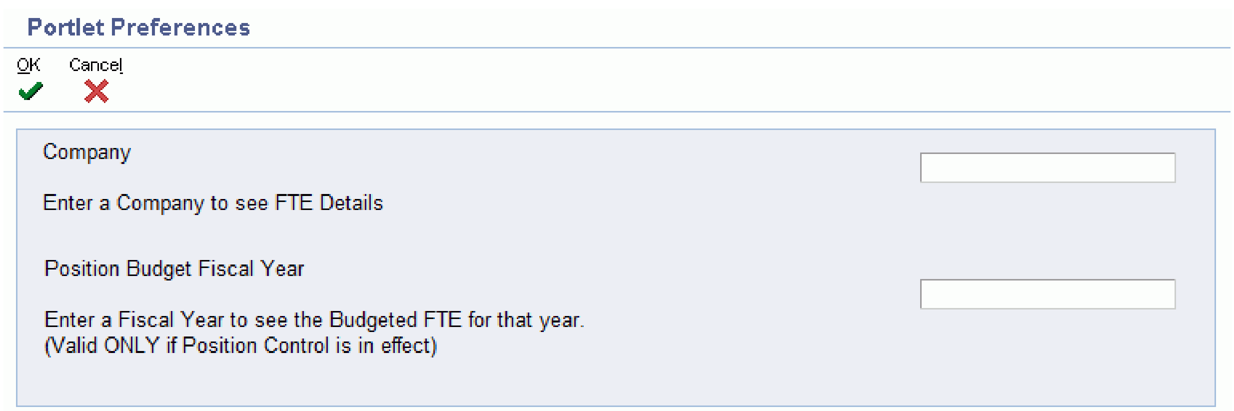


Figure 3–5 Headcount Portlet Preferences



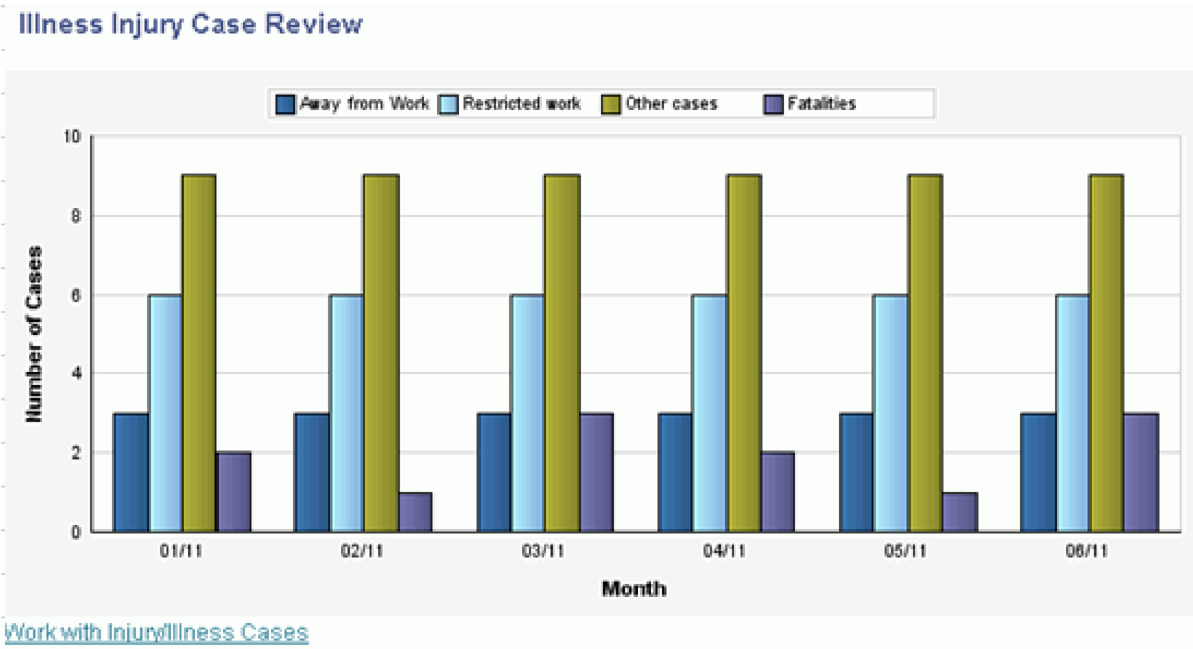
Selecting the Personalize icon will enable parameters to be set for this portlet.

Selection	Value	Result
Company. Enter a Company to see FTE Details.	Enter company name.	Displays FTE Details.
Position Budget Fiscal Year	Enter a Fiscal Year.	Displays Budgeted FTE for that year. (Valid ONLY if Position Control is in effect).

3.1.3 HR - Health & Safety Cases (P08601PT)

This portlet will display health and safety cases in the form of Bar Chart. The bar chart will display four bars for each month. The displayed bars are: Away from Work, Restricted work, Other cases and Fatalities.

Figure 3–6 Health & Safety Cases portlet



Selecting the Personalize icon will enable parameters to be set for this portlet.

Selection	Value	Result
Establishment	Enter company name.	Displays FTE Details.
Home Company	Enter a Fiscal Year.	Displays Budgeted FTE for that year. (Valid ONLY if Position Control is in effect).
Case Status		
Number of Months to be displayed.	Enter number of months to be displayed.	Displays number of months.
Ending Month (Required)	Enter ending month.	Displays Ending Month.
Ending Year (Required)	Enter ending year.	Displays Ending Year.
Government Reportable Only?	Enter Y of N.	
Display only Illness or Injury?	Enter Y of N.	

Figure 3–7 Portlet Preferences

3.1.4 HR - Overtime Report (P0618PTL)

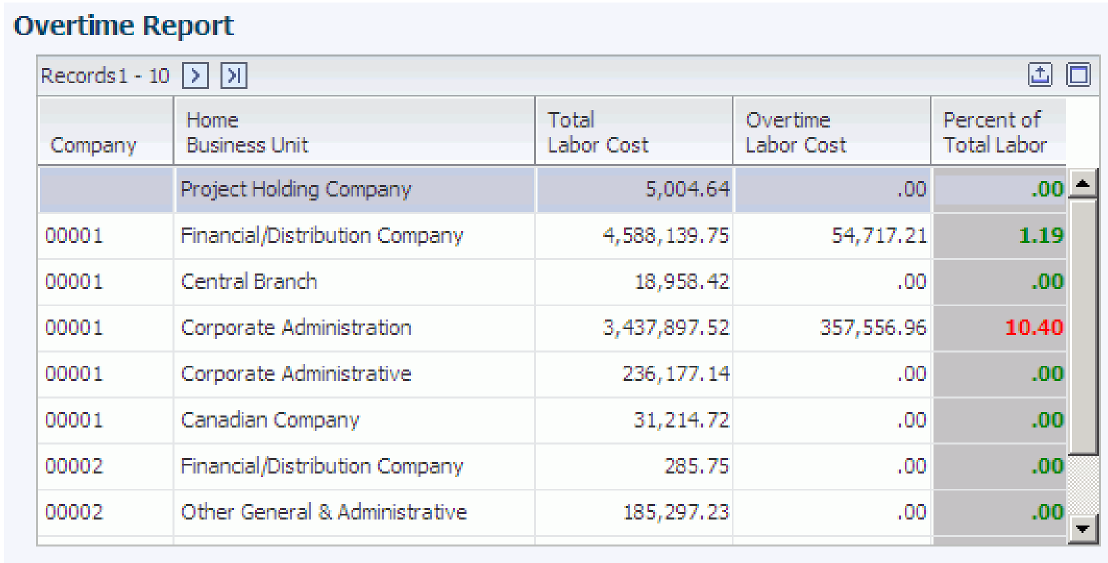
The Overtime Report portlet displays the Overtime Report in a grid format. The columns in the grid are:

1. Company
2. Home Business Unit
3. Total Labor Cost
4. Overtime Labor Cost
5. Percent of Total Labor

The final row displays the Grand Total.

Note: The first time launch of this portlet will display all overtime details of all the Companies. Since the preferences are not filled in, the color coding will not be there.

Figure 3–8 Overtime Report portlet



Overtime Report

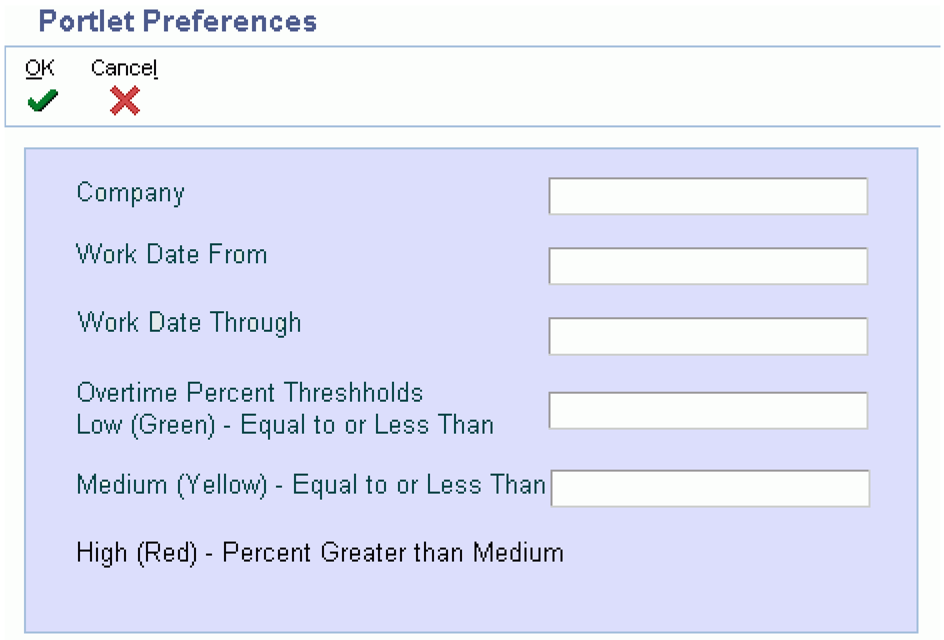
Records 1 - 10

Company	Home Business Unit	Total Labor Cost	Overtime Labor Cost	Percent of Total Labor
	Project Holding Company	5,004.64	.00	.00
00001	Financial/Distribution Company	4,588,139.75	54,717.21	1.19
00001	Central Branch	18,958.42	.00	.00
00001	Corporate Administration	3,437,897.52	357,556.96	10.40
00001	Corporate Administrative	236,177.14	.00	.00
00001	Canadian Company	31,214.72	.00	.00
00002	Financial/Distribution Company	285.75	.00	.00
00002	Other General & Administrative	185,297.23	.00	.00

Selecting the Personalize icon will enable parameters to be set for this portlet.

Selection	**Value**	**Result**
Company	Enter a Company.	Displays the Company.
Work From Date	Enter a Work From Date.	Displays Work From Date.
Work Date Through	Enter a Work Through Date.	Displays Work Through Date.
Overtime Percentage Thresholds Low (Green) Equal to or Less Than	Enter a percentage equal to or less than.	Displays a percentage equal to or less than.
Medium (Yellow) Equal to or Less Than	Enter a percentage equal to or less than.	Displays a percentage equal to or less than.
High (Red) Percent Greater Than Medium.	Enter a percentage greater than Medium.	Displays a percentage greater than Medium.

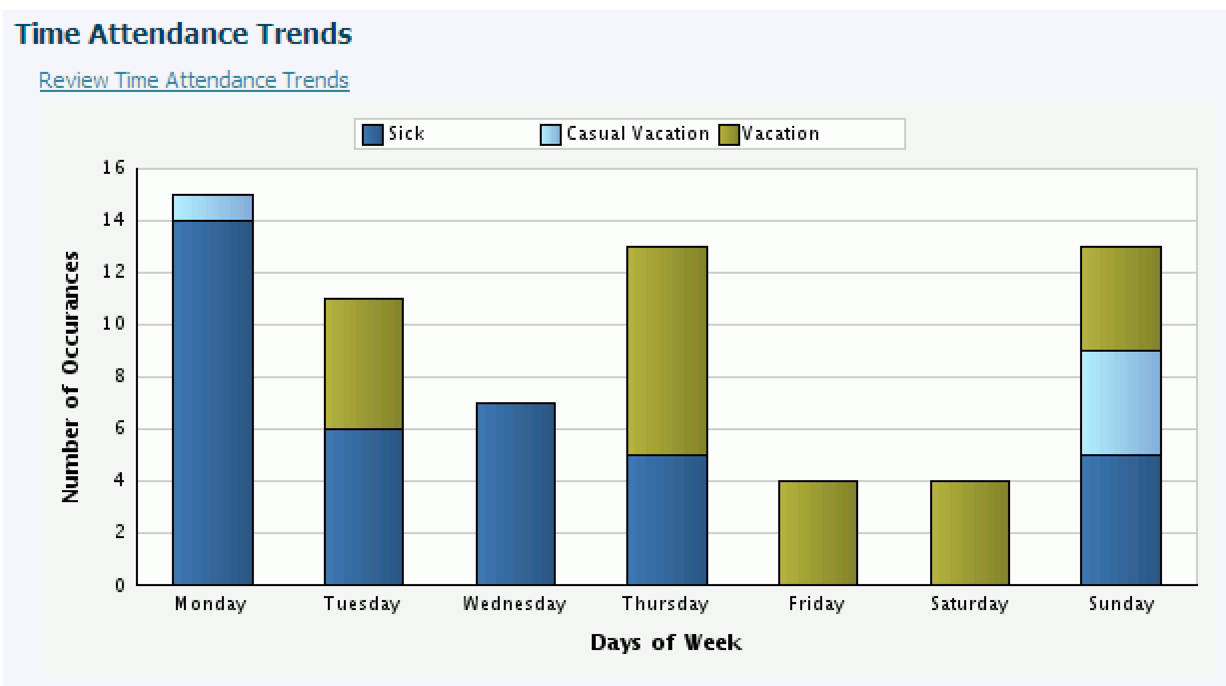
Figure 3–9 Portlet Preferences



3.1.5 HR - Time Attendance Trends (P07631PT)

The Time Attendance Trends portlet displays Casual Leave, Casual Vacation, Sick and Vacation trends in a bar chart format. The x axis displays the days of the week. The y axis can be set to display either the number of occurrences or the number of hours.

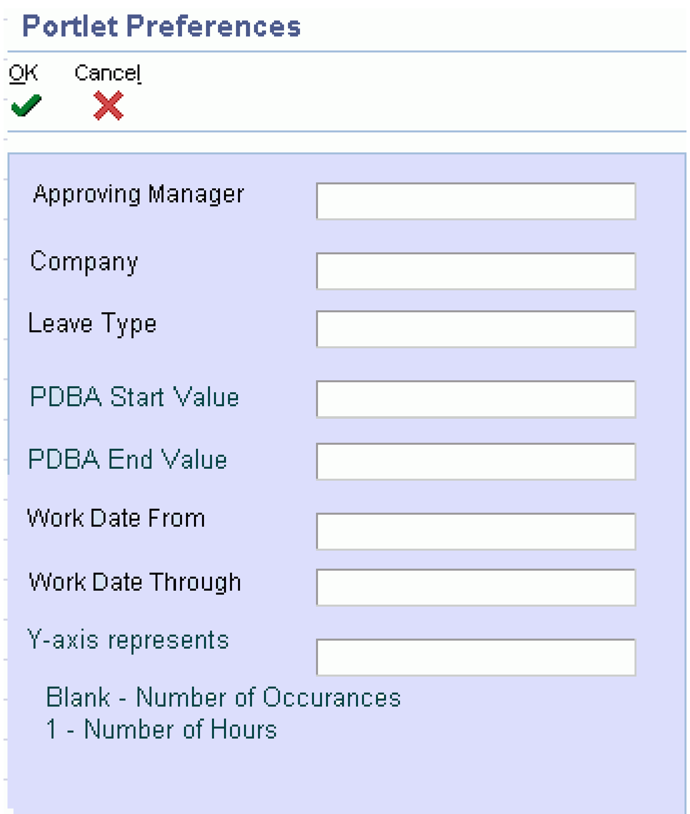
Figure 3–10 Time Attendance Trends Portlet



Selecting the Personalize icon will enable parameters to be set for this portlet.

Selection	Value	Result
Approving Manager	Enter Approving Manager name.	Displays name of Approving Manager.
Company	Enter company name.	Displays company name.
Leave Type	Enter leave type	Displays leave type.
PDBA Start Value	Enter PBDA value.	Displays PDBA Start Value.
PDBA End Value	Enter PBDA value.	Displays PDBA End Value.
Work Date From	Enter date.	Displays Work From date.
Work Date To	Enter date.	Displays Work To date.
Y-axis represents	Blank 1	Number of Occurrences Number of Hours

Figure 3–11 Time Attendance Portlet Preferences



3.1.6 HR - Upcoming Reviews (P0522PT)

The HP - Upcoming Reviews portlet provides tracking for upcoming reviews. This portlet displays information in a grid format with columns for:

- Alpha Name

- Next Review Date
- Type Review Description

This portlet has two mode options based on its configuration:

- Supervisor
- HR

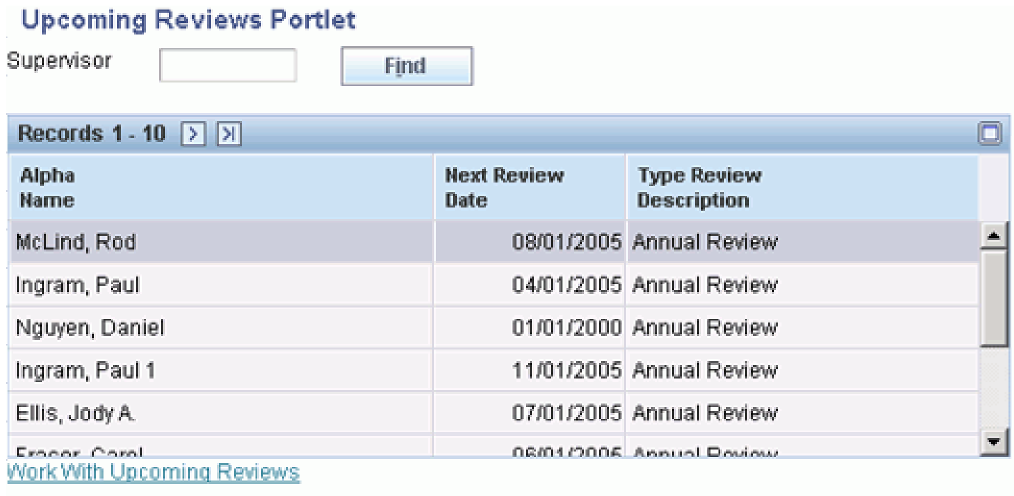
> **Note:** The HR mode has an additional Supervisor entry field on the portlet.

Upcoming Reviews portlet considerations:

- When the portlet is launched for the first time all the reviews will be displayed for the logged-in user and will be based on the Supervisor for that user and will be in HR mode. If the login user is the supervisor, then the display will be in Supervisor mode.
- Since Page at Time processing is enabled for the grid, initially 10 records will be displayed and on hitting the next button, the next set of 10 records will be displayed. The user will be able to scroll up to see previous records.
- The Supervisor Search Box and Find button will be displayed only in HR mode and will enable the HR to filter the records for a given supervisor.
- A visual assist will be provided for the Supervisor Search Box.
- The link to the application will be shown/hidden based on the Configuration Options.

Figure 3–12 Upcoming Reviews Portlet in Supervisor mode

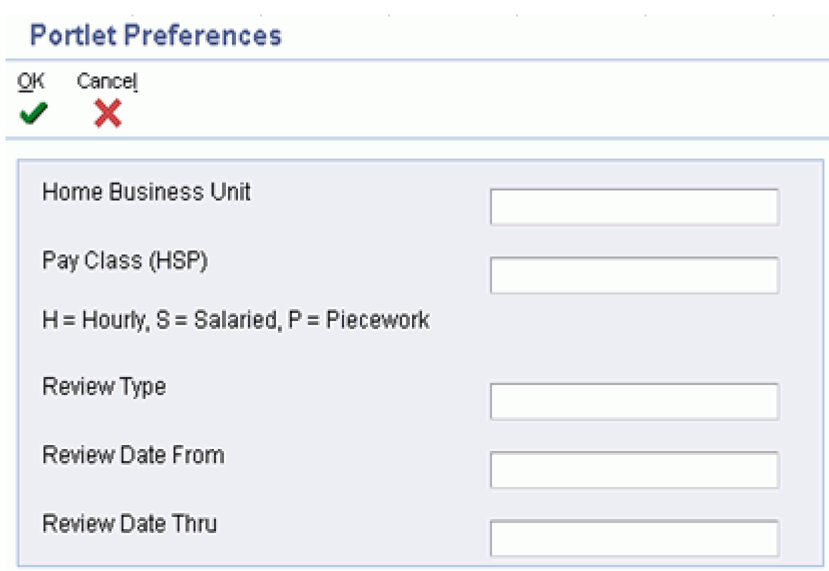
Figure 3–13 Upcoming Reviews Portlet in HR mode



Selecting the Personalize icon will enable parameters to be set for this portlet.

Selection	Value	Result
Home Business Unit	Enter Home Business Unit.	Displays Home Business Unit.
Pay Class (HSP)	H = Hourly S = Salaried P = Piecework	Displays Hourly, Salaried, or Piecework information based on value.
Review Type	Enter Review Type.	Displays Review Type.
Review Date From	Enter the beginning review date.	Displays Review Date From.
Review Date Thru	Enter the ending review date.	Displays Review Date Thru.

Figure 3–14 Portlet Preferences



4

Understanding SRM Portlets

This chapter contains the following topics:

- Section 4.1, "Understanding the SRM Portlet"
- Section 4.2, "Configuring the Portlet"
- Section 4.3, "Editing the Portlet"
- Section 4.4, "Understanding Lean Procurement within the SRM Portlet"
- Section 4.5, "Processing Supplier Release Schedules Using the SRM Portlet"
- Section 4.6, "Processing Kanbans Using the SRM Portlet"

See Also:

- *"Setting Up Viewable and Configurable Portlets"* in this guide.

4.1 Understanding the SRM Portlet

The SRM Configurable Portlet provides a fully configurable shell portlet. You can select the queries to display in the portlet at runtime using a wizard interface.

The SRM Alerts Portal program (P43SPLET) is a portal application with a single portlet form (Configurable_SRM Component) which is based on Form Design Aid (FDA). You use the SRM Alerts Portal program to configure the alerts. You can deploy the SRM Alerts Portal program on the Oracle Web Center Spaces or on the IBM Collaborative Portal (WebSphere Application Server - WAS).

Note: This section of the guide should be used in conjunction with the *JD Edwards EnterpriseOne Applications Buyer Workspace and Supplier Self Service Implementation Guide*.

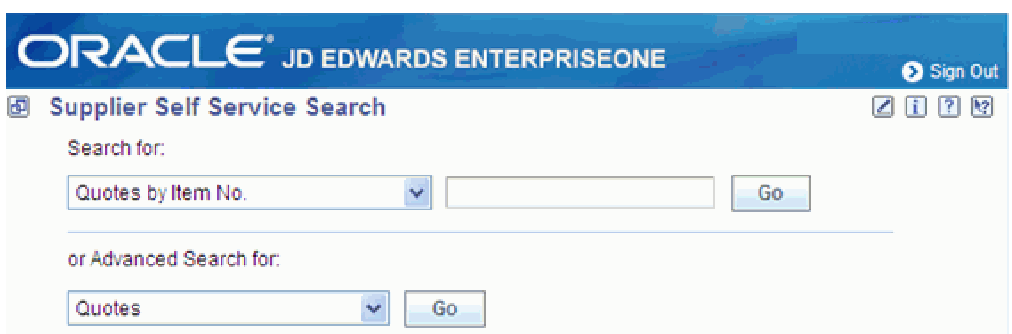
The portlet displays only those alerts which you have configured. This illustration provides an example of the Configurable_SRM Component portlet form with a list of previously configured alerts:

Figure 4–1 Configurable_SRM Component

4.1.1 Supplier Self-Service Search Portlet (P43S801)

The Supplier Self Service Search portlet provides a default or an advanced search for service related information.

Figure 4–2 Supplier Self Service Search Portlet



Selecting the Personalize icon will enable defaults to be selected for the default and advanced search.

The options available for the Default Search Type are:

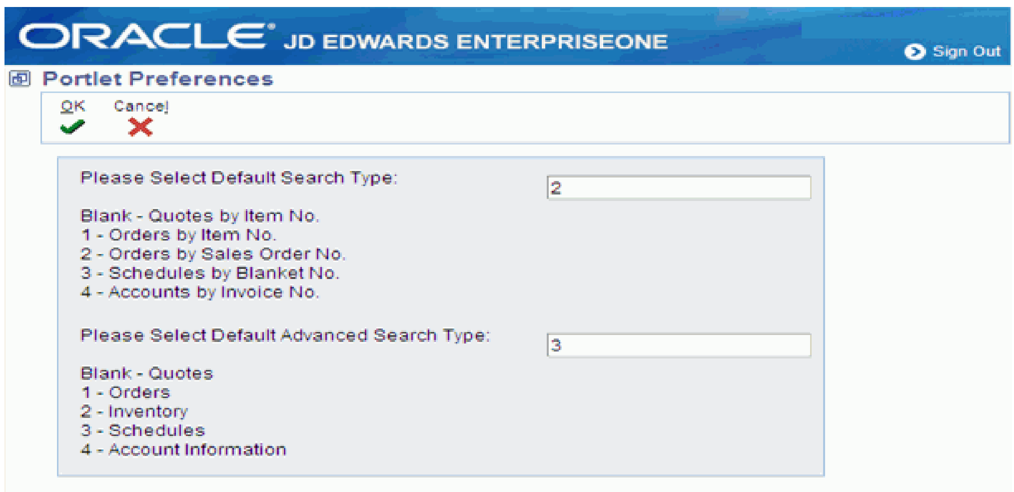
Value	Selection
Blank	Quotes by Item No.
1	Orders by Item No.
2	Orders by Sales Order No.
3	Schedules by Blanket Order No.
4	Accounts by Invoice No.

The options available for the Default Advanced Search Type are:

Value	Selection
Blank	Quotes
1	Orders
2	Inventory
3	Schedules
4	Account Information

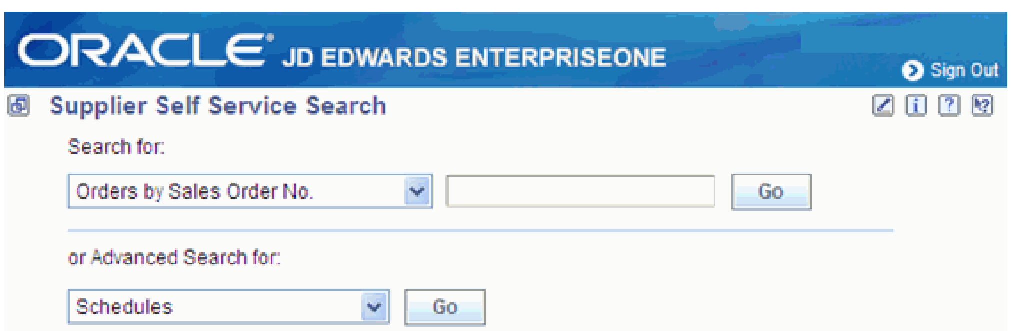
In this example we will select 2 -Orders by Sales Order No. for the Default Service Search Type and 3 - Schedules for the Default Advanced Search Type.

Figure 4–3 Supplier Self Service Search Portlet Personalization Preferences



These values will now become the default when the portlet is displayed.

Figure 4–4 Supplier Self Service Search Portlet Example



4.1.2 SRM Buyer Portlet (P43Q01SS)

The SRM Buyer portlet provides Task and Alert selections. The Tasks selections are:

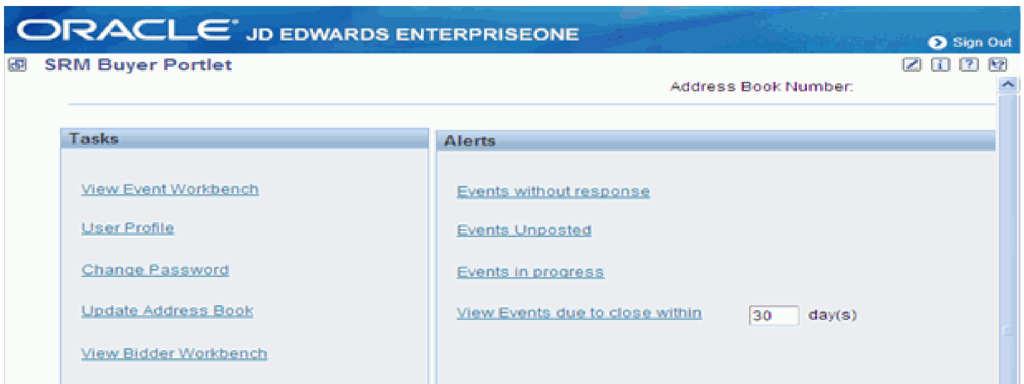
- View Event Workbench
- User Profile

- Change Password
- Update Address Book
- View Bidder Workbench

The Alerts selections are:

- Events without response
- Events Unposted
- Events in progress
- View events due to close in within x days

Figure 4–5 SRM Buyer Portlet



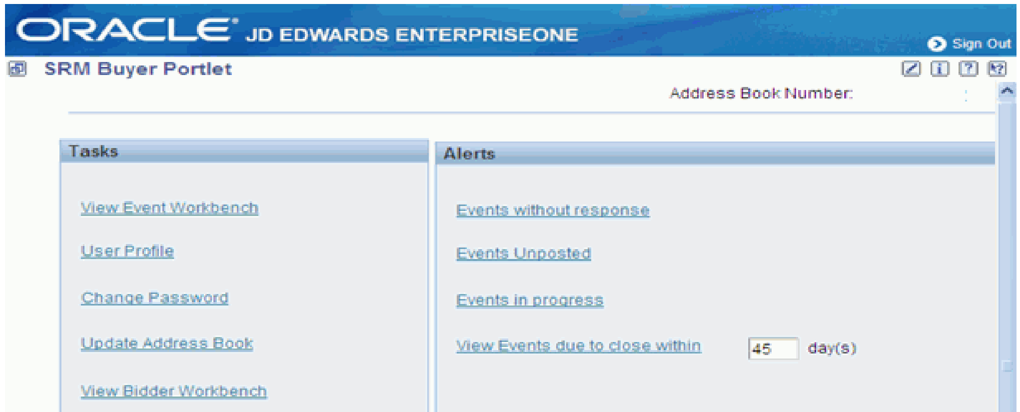
Selecting the Personalize icon enables the View Events due to close within day(s) field to be set to a default number. The default number of days is initially set based on the Processing Option.

In this example, we will set the default number of days to 45.

Figure 4–6 SRM Buyer Portlet Personalization Preference

This will result in the View Events due to close within days field showing the default number of days as 45.

Figure 4–7 SRM Buyer Portlet Example



4.1.3 SRM Bidder/Supplier Portlet (P43Q01SS)

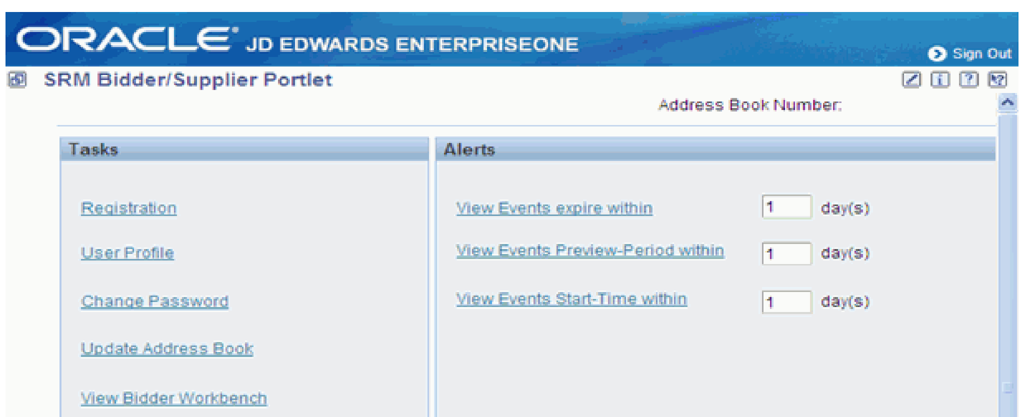
The SRM Bidder/Supplier portlet provides Task and Alert selections. The Tasks selections are:

- Registration
- User Profile
- Change Password
- Update Address Book
- View Bidder Workbench

The Alerts selections are:

- View Events expire within x day(s)
- View Events Preview-Period within x day(s)
- View EventsStart-Time within x day(s)

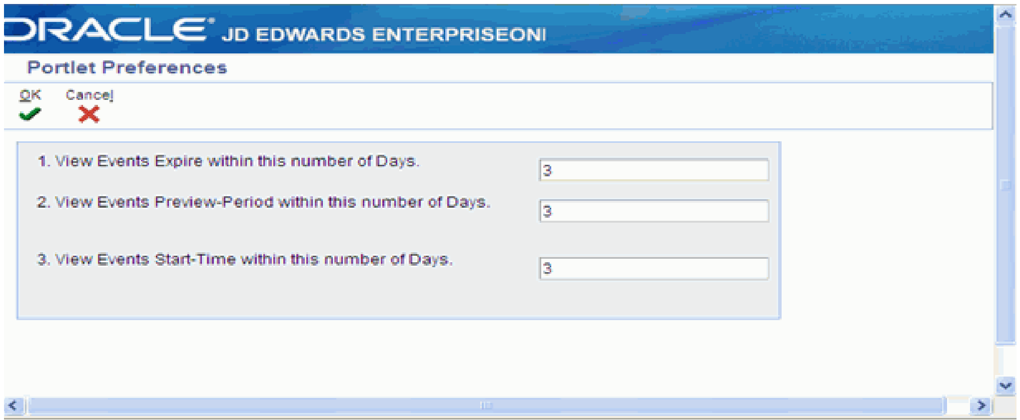
Figure 4–8 SRM Bidder/Supplier Portlet



Selecting the Personalize icon will enables the View Events expire within day(s) field, the View Events Preview-Period within day(s) field, and the View EventsStart-time within day(s) field to be set to a default number of days.

In this example, we will set the default number of days for each to 3.

Figure 4–9 SRM Bidder/Supplier Portlet Personalization Preferences



This will result in these fields showing the default number of days as 3.

Figure 4–10 SRM Bidder/Supplier Portlet Example

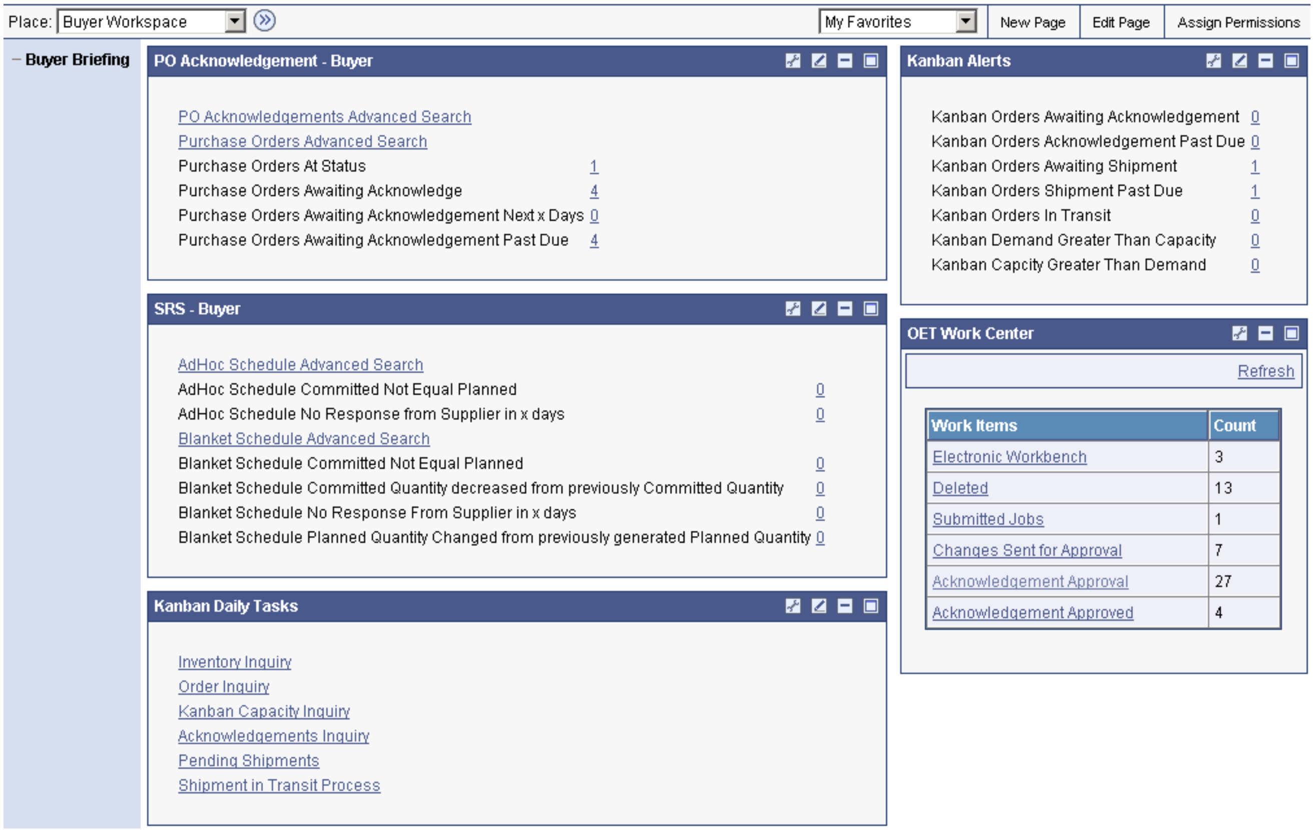
4.1.4 Supplier Self-Service and Buyer Workspace

You can create a page that contains portlets either for suppliers or portlets for buyers. You must select the user role when configuring the alerts. All supplier applications are available to the buyer, so that the buyer can perform an action on behalf of a supplier if the need arises. The supplier however, cannot perform buyer tasks.

Note: If the User Logs into the Supplier Self Service workspace as supplier, the User Role option defaults as Supplier in the configurable form. And, if the user logs into Supplier Self Service workspace as buyer, the User Role option defaults as Buyer in the configurable form.

The following screen is an example of a page that has been set up for a buyer:

Figure 4–11 Buyer Briefing page



On this page, each of the portlets (PO Acknowledgement - Buyer, SRS - Buyer, and so on), is a copy of the SRM portlet, except for the OET Work Center portlet. Each copy of the portlet has been assigned a name that appears in the dark blue bar. Each portlet has been configured to include different alerts and those alerts have been configured in some cases to use customized descriptions.

4.2 Configuring the Portlet

This section provides an overview of the configure wizard and discusses how to:

- Set portlet preferences.
- Configure alerts.
- Select alerts.
- Define alert parameters.

4.2.1 Understanding the Configure Wizard

You must configure each instance of the portlet to communicate with JD Edwards EnterpriseOne. You also configure the portlet to specify which alerts and tasks to display and to set up specific aspects of each task and alert, such as which version of the called program to use, whether the alert is used by the buyer or supplier, and the data that the alert or task displays.

You only need to configure each portlet instance once for all users. An individual with appropriate administrative rights must configure the portlet.

You use the Configurable_SRM Component program (P43S001) to select and configure the alerts on the portal. This application provides the flexibility to select and configure the alerts that you would like to view on the portal.

Based on the alerts you select, the program displays the alert configuration forms that you use to configure the alerts using specific input parameters.

The Alerts Master table (F43S001) stores the list of alerts currently available in the Supplier Self-Service portal. You can use the JD Edwards EnterpriseOne row security feature to apply data security to this table. Data security is based on the user ID which enables you to view and configure only those alerts for which you have permission. The alert IDs and description are stored in a new UDC table 43S/AL. The Populate Alert IDs to F43S001 report (R43S001) copies the alert IDs from the UDC table to the F43S001 table. The system retrieves the alert description from the UDC table at run-time. You can control the language for the alerts by setting the language preference in the user options.

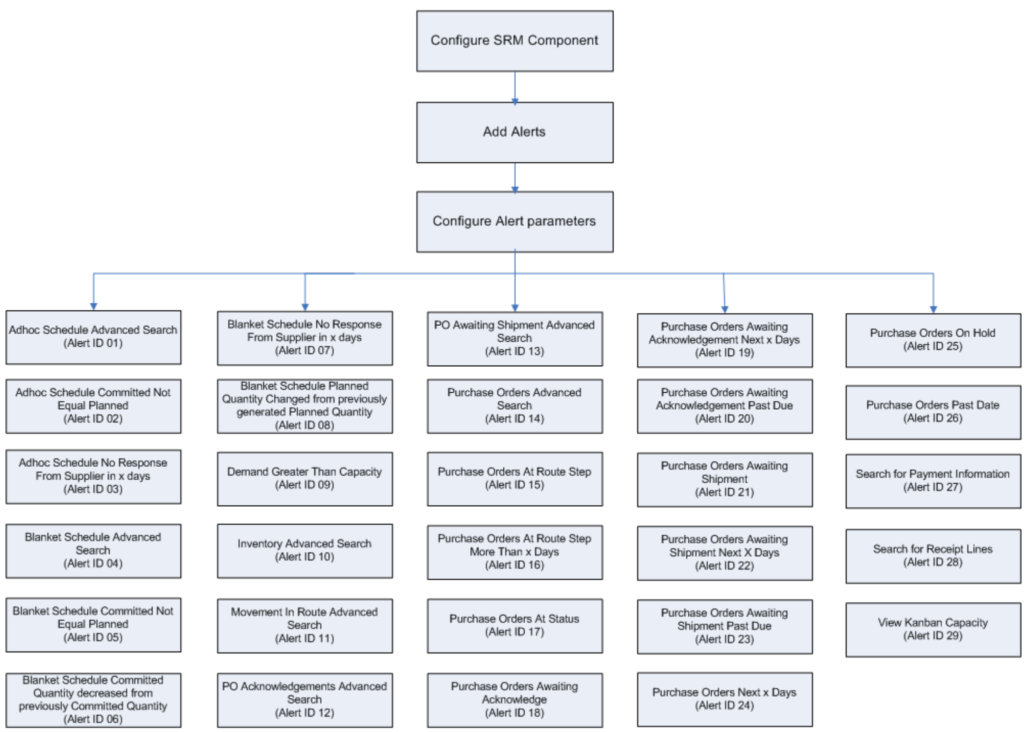
You use the Alerts Configuration table (F43S002) to store the user's alerts configuration.

See Also:

- "Understanding Row Security" in *JD Edwards EnterpriseOne Tools Security Administration Guide*.

This flowchart illustrates the process for configuring alerts.

Figure 4–12 Process for Configuring Alerts



4.2.2 Forms Used to Configure the Portlet

These are the pages used to configure the portlet:

Form Name	FormID	Navigation	Usage
Configurable_SRM Component	S43SPLETA	Click the Create Page or Edit Page option on the Choose Page Actions form and then click Add Content button to choose portlets from the catalog. Select the available portlet.	Specify whether to create a new portlet or to select an existing portlet.
Select Alerts for Configuration	W43S001A	Click the Edit Configuration link. Select an alert and then click Save/Next button.	Select and configure the alerts to include in the selected incidence of the SRM portlet.

Note: You must advance through all steps of the configure wizard and click Done on the last step to save any changes you have made to the configuration.

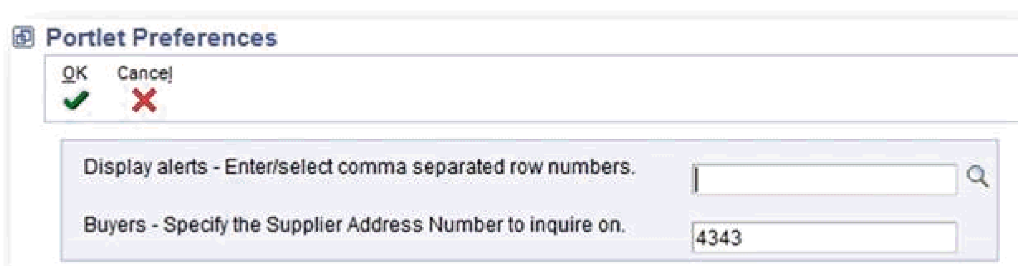
4.2.3 Setting Up Portlet Preferences

You use the Portlet Preferences form to specify information on the portlet such as the alerts to display and the supplier address number to inquire. The supplier address number to inquire is applicable only for the buyers.

The Edit option on the Configurable_SRM Component form launches the Portlet Preferences form.

Access the Portlet Preferences form.

Figure 4–13 Portlet Preferences Form



Display alerts - Enter/select comma separated row numbers.
Select the alerts which you want to display on the portal. You will have to enter the alerts as a string separated delimiter comma.

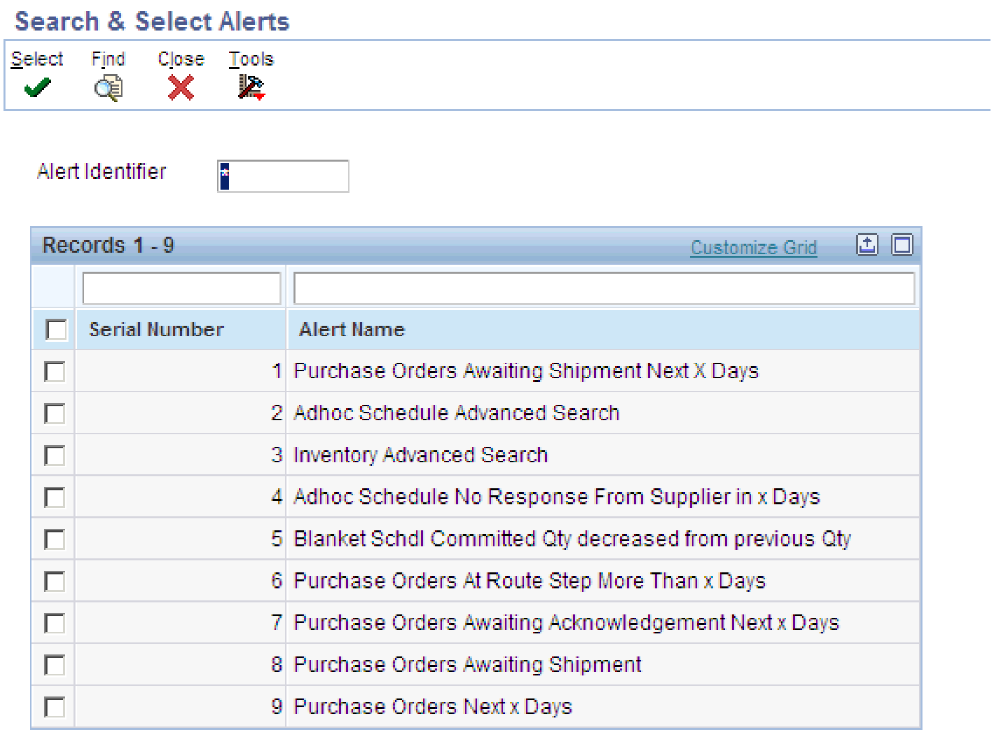
Buyers - Specify the Supplier Address Number to Inquire on.
Specify the address number for the supplier on whose orders you want to inquire.

The system considers this option only if the alert is configured for the buyer.

In Display alerts field click on the Visual Assist icon, this launches the Search and Select Alerts form. On this form, you can select the predominantly used alerts from the records and then, click the Select button. This enables you to display only those selected alerts on the portal.

Access the Search and Select Alerts form.

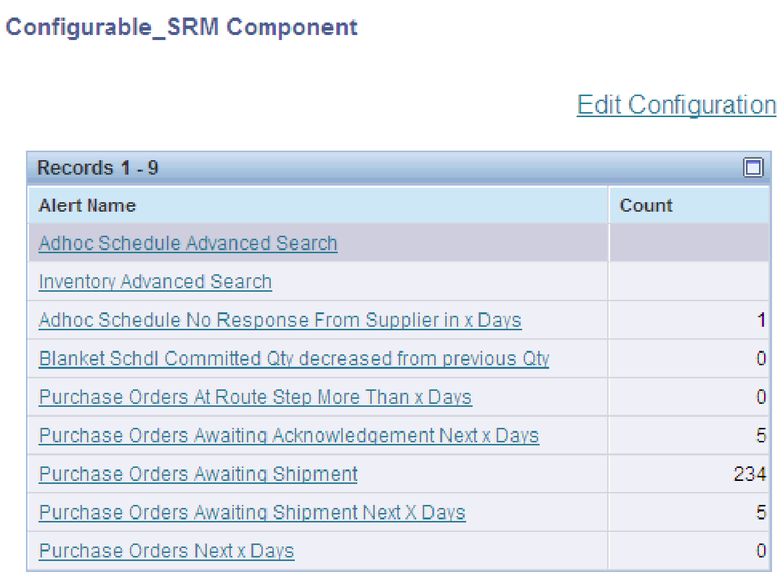
Figure 4–14 Search and Select Alerts



4.2.4 Configuring Alerts

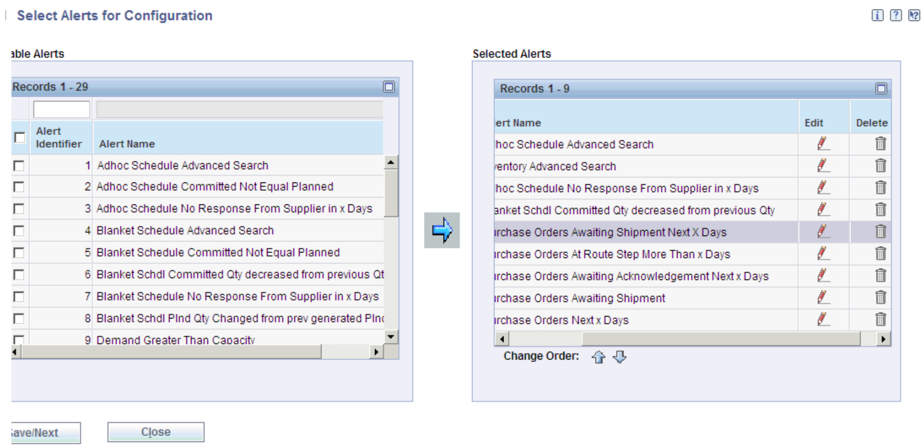
This section discusses how to configure an alert in the SRM portal. You can configure the same alert multiple times, where the portal form displays each instances of the alert separately. The following example shows how to configure an alert.

Figure 4–15 Configurable_SRM Component



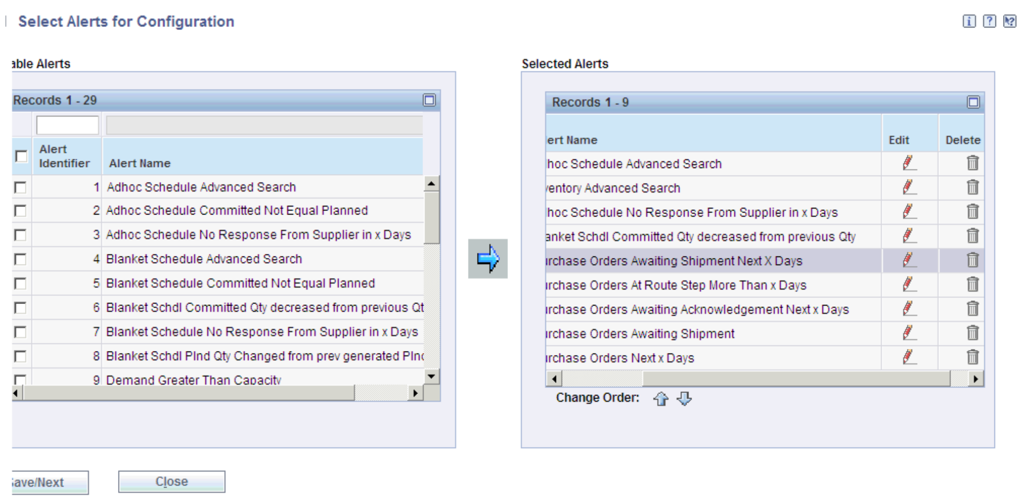
1. On the Configurable_SRM Component form, click the Edit Configuration link to launch the Select Alerts for Configuration form.

Figure 4–16 Select Alerts for Configuration



2. On the Select Alerts for Configuration form, select an alert from the Available Alerts grid, and move the alert to the Selected Alerts grid using the right-pointing arrow button. You use the Edit and Delete icons to edit or delete a specific alert in the Selected Alerts grid.

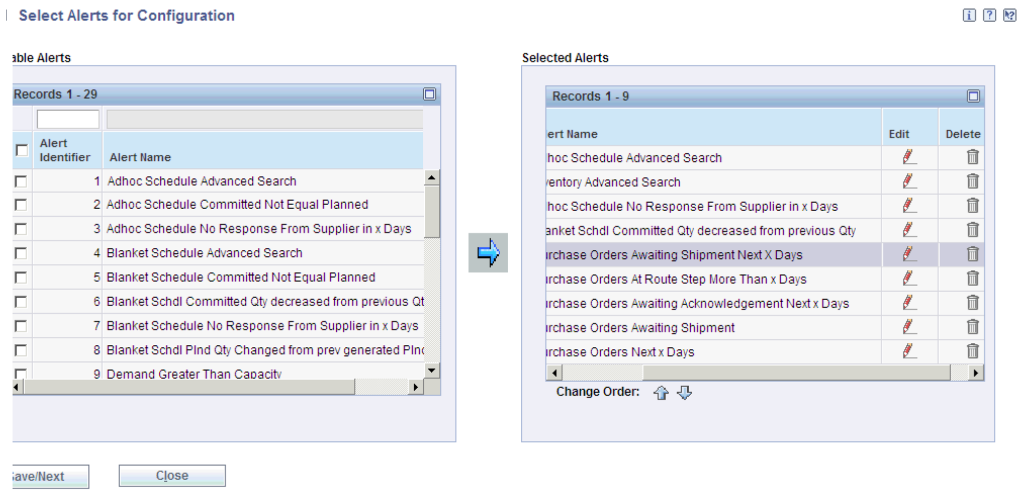
Figure 4–17 Select Alerts for Configuration



3. To change the order of a selected alert in the grid, use the Move Up and Move Down Arrows.

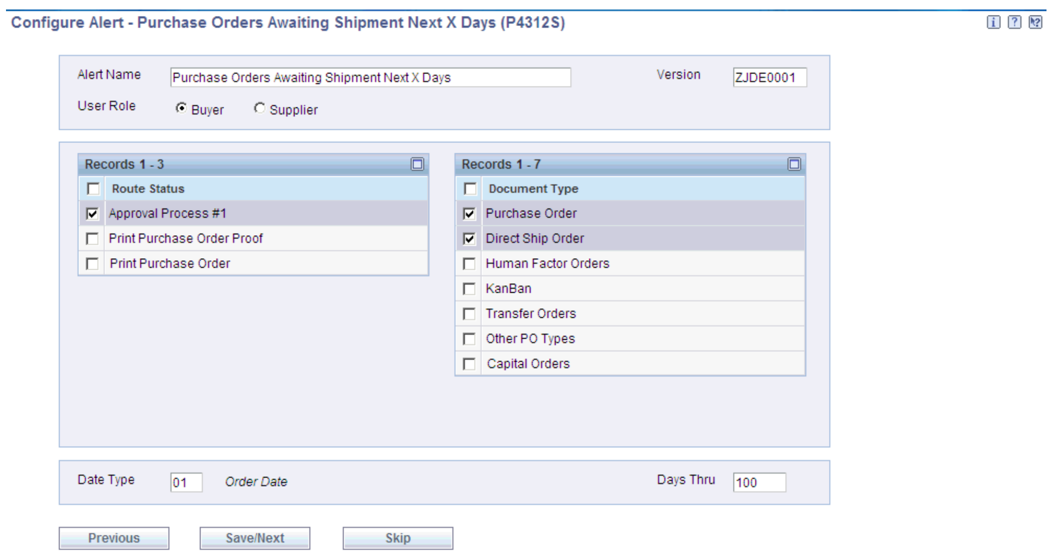
Note: You should move the alert to the top of the grid in order to configure the alert.

Figure 4–18 Select Alerts for Configuration



4. Click the Save/Next button.

Figure 4–19 Purchase Orders Awaiting Shipment Next X Days



5. On the Configure Alert Parameters form, you use the user role radio button for whom you are setting up this alert. You can either select the user role as buyer or supplier when you log into the portal.

   You use the Supplier radio button to specify the user role as Supplier to set up the alert.

   Note: If the user logs into the portal as a supplier (who has record in the Supplier Master table) then the user role defaults as supplier.

   You use the Date Type field to select the date on which you want to base the alert.

   You use the Days Thru field to enter the number of days that are represented by the variable x. The system displays purchase orders that are awaiting shipment within the number of days that you specify.

You use the Previous button to go back to the previous page.

Select the records and click Save/Next button to save the configuration.

4.2.5 Selecting Alerts

The Configurable_SRM Component form displays all the alerts in the Available Alerts grid and the alerts selected for the configuration in the Selected Alerts grid.

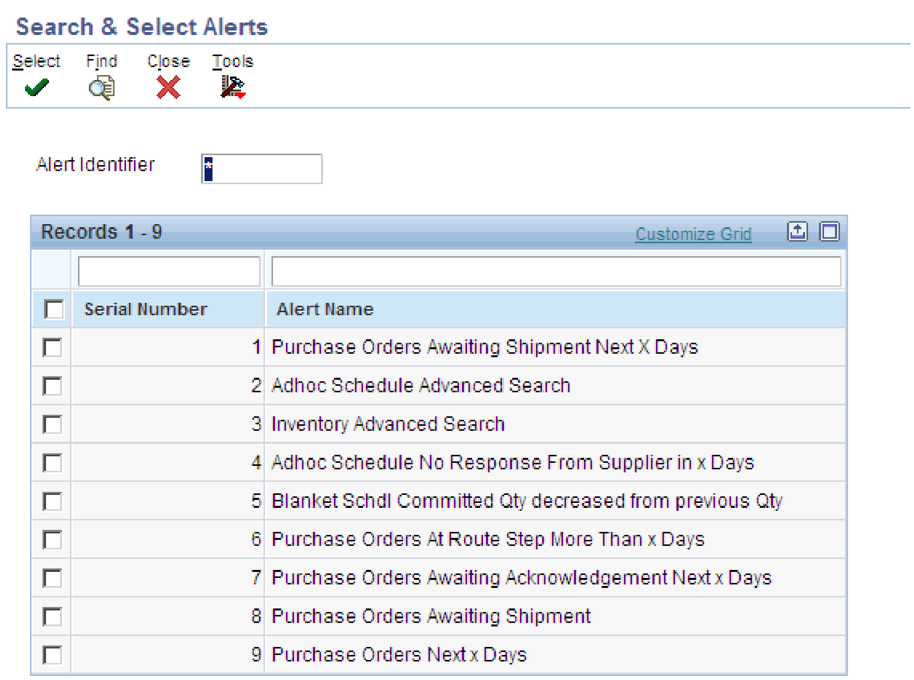
You use the right-pointing arrow to move the alerts from the Available Alerts grid to the Selected Alerts grid. You can then select the alerts that you want to configure and click the Save or Next button to continue with the configuration.

You use the Edit and Delete icons to edit or delete a specific alert from the Selected Alerts grid.

You use the Move Up and Move Down arrows to change the order of the alerts in the Selected Alerts grid. The order of the alerts in the Selected Alerts grid determines the order in which the alerts appear on the portlet. When you change the order of the selected alerts, only the first selected alert will be moved either up or down in the grid.

Access the Select Alerts for Configuration form.

Figure 4–20 Select Alerts for Configuration



This table lists the available alerts:

Available Alerts	Alert ID	Associated Program	Initial Form Displayed
Adhoc Schedule Advanced Search	01	P34302	W34302B
Adhoc Schedule Committed Not Equal Planned	02	P34302	W34302A
Adhoc Schedule No Response From Supplier in x days	03	P34302	W34302A

Available Alerts	Alert ID	Associated Program	Initial Form Displayed
Blanket Schedule Advanced Search	04	P34301	W34301A
Blanket Schedule Committed Not Equal Planned	05	P34301	W34301I
Blanket Schedule Committed Quantity decreased from previously Committed Quantity	06	P34301	W34301I
Blanket Schedule No Response From Supplier in x days	07	P34301	W34301I
Blanket Schedule Planned Quantity Changed from previously generated Planned Quantity	08	P34301	W34301I
Demand Greater Than Capacity	09	P3019	W3019B
Inventory Advanced Search	10	P41204	W41204A
Movement In Route Advanced Search	11	P43250SS	W43250SSC
PO Acknowledgements Advanced Search	12	P43S01	W43S01D
PO Awaiting Shipment Advanced Search	13	P4312S	W4312SH
Purchase Orders Advanced Search	14	P43S05	W43S05C
Purchase Orders At Route Step	15	P43250SS	W43250SSA
Purchase Orders At Route Step More Than x Days	16	P43250SS	W43250SSA
Purchase Orders At Status	17	P43S05	W43S05A
Purchase Orders Awaiting Acknowledge	18	P43S01	W43S01G
Purchase Orders Awaiting Acknowledgement Next x Days	19	P43S01	W43S01G
Purchase Orders Awaiting Acknowledgement Past Due	20	P43S01	W43S01G
Purchase Orders Awaiting Shipment	21	P4312S	W4312SB
Purchase Orders Awaiting Shipment Next X Days	22	P4312S	W4312SB
Purchase Orders Awaiting Shipment Past Due	23	P4312S	W4312SB
Purchase Orders Next x Days	24	P43S05	W43S05A
Purchase Orders On Hold	25	P43S05	W43S05A
Purchase Orders Past Date	26	P43S05	W43S05A
Search for Payment Information	27	P04111	W04111B
Search for Receipt Lines	28	P43121SS	W43121SSC
View Kanban Capacity	29	P3019	W3019B

Note: You can include an available item more than once in the Selected Items list. This action enables you to use two or more versions of an alert with different configurations.

4.2.6 Defining Alert Parameters

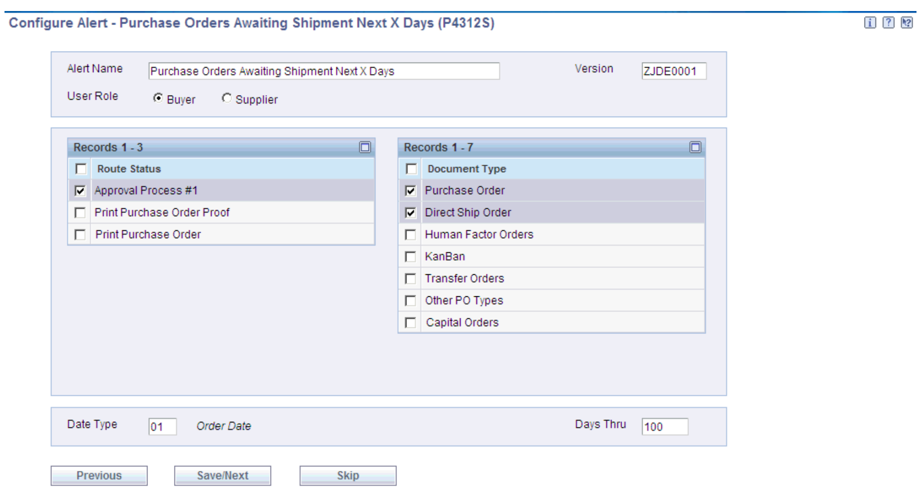
This section discusses how to add or revise alert parameters. You must define parameters for each of the alerts you selected.

Edit settings are specific to each user. Users can configure the portlet according to their individual preferences. Edit settings are generic for all the alerts.

When you edit tasks and alerts that have been configured for the buyer, you have all the same options that you have when you edit tasks and alerts that have been configured for the supplier. In addition, you can specify a supplier address number so that the task or alert displays only those records that are associated with a specific supplier. If you do not specify a supplier number, the buyer can use the task or alert to review records for all suppliers.

Access the Configure Alert Parameters form.

Figure 4–21 Configure Alert Parameters



This section discusses all the alert parameters that you can define.

4.2.6.1 Adhoc Schedule Advanced Search

Adhoc Schedule is accessible through the self-service portal workspace, which is used by both the buyer and the supplier. This program enables you to enter schedules even when no MRP messages and no forecast exist for the item. The buyer can use this program for:

- Entering a new adhoc schedule, for example, in response to an alert.
- Editing the planned quantity in an existing adhoc schedule.
- Editing the committed quantity that is entered by the supplier on an adhoc schedule.

Version

Specify the version of the Adhoc Schedule Revisions program (P34302) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

4.2.6.2 Adhoc Schedule Committed Not Equal Planned

The Adhoc Schedule Committed Not Equal Planned is used when the committed quantity is not equal to the planned quantity.

Version
Specify the version of the Adhoc Schedule Revisions program (P34302) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Days Thru
Enter the number of days beyond the current date for which you want to display records. The system displays only records whose start date is between the current date and the number of days that you specify beyond the current date.

4.2.6.3 Adhoc Schedule No Response From Supplier in x days

The Adhoc Schedule No Response From Supplier in x days displays when the supplier has not committed to the planned quantity within a specified number of days from the release fence.

Version
Specify the version of the Adhoc Schedule Revisions program (P34302) to use. The default version is ZJDE0001.

Alert Name
Enter the text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Days Thru
Enter the number of days beyond the current date for which you want to display records. The system displays only records whose start date is between the current date and the number of days you specify beyond the current date.

Days No Response
Enter the number of days represented by the variable x. The system displays ad hoc schedules for which you have received no response within the number of days that you specify.

4.2.6.4 Blanket Schedule Advanced Search

You use the Blanket Schedule Advanced Search when the buyer enters changes to the supplier schedule. The supplier uses this form to enter commitments.

Version
Specify the version of the Supplier Schedule Revisions program (P34301) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Blanket Order Document Type
Select the document type for blanket orders. The system stores the values in user-defined code (UDC) table 43/OT.

4.2.6.5 Blanket Schedule Committed Not Equal Planned

The buyer uses the Blanket Schedule Committed Not Equal Planned when the committed quantity is not equal to the planned quantity.

Version
Specify the version of the Supplier Schedule Revisions program (P34301) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Blanket Order Document Type
Select the document type for blanket orders. The system retrieves values from UDC table 43/OT.

Days Thru
Enter the number of days beyond the current date for which you want to display records. The system displays only records whose start date is between the current date and the number of days that you specify beyond the current date.

4.2.6.6 Blanket Schedule Committed Quantity decreased from previously Committed Quantity

The buyer uses Blanket Schedule Committed Quantity decreased from previously Committed Quantity, when the supplier decreases the commitment from what was previously committed and does not meet the schedule quantity.

Version
Specify the version of the Supplier Schedule Revisions program (P34301) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Blanket Order Document Type
Select the document type for blanket orders. The system retrieves values from UDC table 43/OT.

Days Thru
Enter the number of days beyond the current date for which you want to display records. The system displays only records whose start date is between the current date and the number of days that you specify beyond the current date.

4.2.6.7 Blanket Schedule No Response From Supplier in x Days

You use Blanket Schedule No Response From Supplier in x Days, when the supplier has not committed to the planned quantity within a specified number of days from the release fence.

Version
Specify the version of the Supplier Schedule Revisions program (P34301) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Blanket Order Document Type
Select the document type for blanket orders. The system retrieves values from UDC table 43/OT.

Days Thru
Enter the number of days beyond the current date for which you want to display records. The system displays only records whose start date is between the current date and the number of days that you specify beyond the current date.

Days No Response
Enter the number of days represented by the variable x. The system displays blanket schedules for which you have received no response within the number of days that you specify.

4.2.6.8 Blanket Schedule Planned Quantity Changed from previously generated Planned Quantity

You use Blanket Schedule Planned Quantity Changed from previously generated Planned Quantity to indicates the number of schedule changes from the previous planned schedule.

Version
Specify the version of the Supplier Schedule Revisions program (P34301) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Blanket Order Document Type
Select the document type for blanket orders. The system retrieves values from UDC table 43/OT.

Days Thru
Specify the minimum number of days by which the planned quantity must have changed from the previously generated planned quantity for you to be alerted of the change.

4.2.6.9 Demand Greater Than Capacity

You use Demand Greater Than Capacity to view the orders for which the demand exceeds capacity or the capacity exceeds demand.

Version
Specify the version of the Kanban Replenishment Capacity program (P3019) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

Demand Capacity Flag
Select an option to specify whether you want to check for items whose demand is greater than capacity or whose capacity is greater than demand.

4.2.6.10 Inventory Advanced Search

You use the Inventory Advanced Search to locate inventory information that is relevant to the supplier who is using the portlet.

Version
Specify the version of the Self-Service - Inventory Information Inquiry program (P41204) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

4.2.6.11 Movement In Route Advanced Search

Movement in Route Advanced Search enables suppliers and third-party service providers to move a shipment to the next route operation, as well as to specify quantity and lot information.

Version
Specify the version of the Self-Service - Movement in Routing program (P43250SS) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

4.2.6.12 PO Acknowledgements Advanced Search

You use PO Acknowledgements Advanced Search to locate purchase orders for the supplier who is using the portlet.

Version
Specify the version of the SRM - PO Acknowledgement program (P43S01) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

4.2.6.13 PO Awaiting Shipment Advanced Search

You use the PO Awaiting Shipment Advanced Search to search for purchase orders that are awaiting shipment.

Version
Specify the version of the Self-Service - Purchase Order Receipts program (P4312S) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

4.2.6.14 Purchase Orders Advanced Search

You use Purchase Orders Advanced Search to locate purchase orders for the supplier who is using the portlet.

Version
Specify the version of the SRM - PO Inquiry program (P43S05) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

4.2.6.15 Purchase Orders At Route Step

You use the Purchase Orders At Route Step to access shipments that are at a specific route step to advance the routing of the shipment.

Version
Specify the version of the Self-Service - Movement in Routing program (P43250SS) to use. The default version is ZJDE0001.

Movement Step Options
Select the route step for which you want to review purchase orders. The system retrieves values from UDC table 43/MS.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Document Type
Select the document types for the purchase orders that you want to review. The system retrieves from UDC table 43/OT.

4.2.6.16 Purchase Orders At Route Step More Than x Days

You use the Purchase Orders At Route Step More Than x Days to access shipments that are at a specific route step to advance the routing of the shipment more than the specified days.

Version
Specify the version of the Self-Service - Movement in Routing program (P43250SS) to use. The default version is ZJDE0001.

Movement Step Options
Select the route step for which you want to review purchase orders. The system retrieves values from UDC table 43/MS.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Document Type
Select the document types for the purchase orders that you want to apply receipt routing. The system retrieves values from UDC table 43/OT.

Days Thru
Enter the number of days represented by the variable x. The system displays purchase orders that have been at a specific route step for more than the number of days that you specify.

4.2.6.17 Purchase Orders At Status

You use the Purchase Orders At Status to review purchase order information.

Version
Specify the version of the SRM - PO Inquiry program (P43S05) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Line Status
Select the line statuses for which you want to be alerted. The system retrieves values from UDC table 43S/IS.

Document Type
Select the document types for which you wanted to be notified that a purchase order line is at the status that is specified in the Line Status option. The system retrieves values from UDC table 43/OT.

4.2.6.18 Purchase Orders Awaiting Acknowledge

The supplier uses Purchase Order Awaiting Acknowledge to review purchase orders that are awaiting acknowledgement.

Version
Specify the version of the SRM - PO Acknowledgement program (P43S01) to use. The default version is ZJDE0001.

Acknowledgement Status
Select the status that you want to be applied to the purchase order when it is acknowledged. The system retrieves values from UDC table 40/AT.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Document Type
Select the document types of the purchase orders that are awaiting acknowledgement for which you want to be alerted. The system retrieves values from UDC table 43/OT.

4.2.6.19 Purchase Orders Awaiting Acknowledgement Next x Days

The supplier uses the Purchase Orders Awaiting Acknowledgement Next x Days to review purchase orders that are awaiting acknowledgement for more than the specified days.

Version
Specify the version of the SRM - PO Acknowledgement program (P43S01) to use. The default version is ZJDE0001.

Acknowledgement Status
Select the status that you want to apply to the purchase order when it is acknowledged. The system retrieves values from UDC table 40/AT.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Document Type
Select the document types of the purchase orders that are awaiting acknowledgement within the next x days for which you want to be alerted. The system retrieves values from UDC table 43/OT.

Date Type
Select the date on which you want to base the alert. The system retrieves values from UDC 43/DS.

Days Thru
Enter the number of days that represented by the variable x. The system displays purchase orders that are due to be acknowledged within the number of days that you specify.

4.2.6.20 Purchase Orders Awaiting Acknowledgement Past Due

The supplier use the Purchase Orders Awaiting Acknowledgement Past Due to review purchase orders that are awaiting acknowledgement.

Version
Specify the version of the SRM - PO Acknowledgement program (P43S01) to use. The default version is ZJDE0001.

Acknowledgement Status
Select the status that you want to apply to the purchase order when it is acknowledged. The system retrieves values from UDC table 40/AT.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Document Type
Select the document types of the past due purchase orders that are awaiting acknowledgement for which you want to be alerted. The system retrieves values from UDC table 43/OT.

Date Type
Select the date on which you want to base the alert. The system retrieves values from UDC 43/DS.

Days Thru
Specify the number of days past due based on the date that you selected in the *Date Type* option. The system displays purchase orders that are awaiting acknowledgement for which the current date exceeds the date that you specify in the *Date Type* option by the number of days you specify in the *Days Thru* option.

4.2.6.21 Purchase Orders Awaiting Shipment

You use the Purchase Orders Awaiting Shipment to access purchase orders that are awaiting shipment to send a shipment notification.

Version
Specify the version of the Self-Service - Purchase Order Receipts program (P4312S) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Route Status
Select the route status for purchase orders that are awaiting shipment. The system retrieves values from UDC table 43/OS.

Document Type
Select the document types of the purchase orders that are awaiting shipment for which you want to be alerted. The system retrieves values from UDC table 43/OT.

4.2.6.22 Purchase Orders Awaiting Shipment Next X Days

You use the Purchase Orders Awaiting Shipment Next X Days to access purchase orders that are awaiting shipment to send a shipment notification.

Version
Specify the version of the Self-Service - Purchase Order Receipts program (P4312S) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Route Status
Select the route status for purchase orders that are awaiting shipment within the specified number of days. The system retrieves values from UDC table 43/OS.

Document Type
Select the document types of the purchase orders that are awaiting shipment within the next x days for which you want to be alerted. The system retrieves values from UDC table 43/OT.

Date Type
Select the date on which you want to base the alert. The system retrieves values from UDC 43S/DS.

Days Thru
Enter the number of days that are represented by the variable x. The system displays purchase orders that are awaiting shipment within the number of days that you specify.

4.2.6.23 Purchase Orders Awaiting Shipment Past Due

You use the Purchase Orders Awaiting Shipment Past Due to access purchase orders that are awaiting shipment to send a shipment notification.

Version
Specify the version of the Self-Service - Purchase Order Receipts program (P4312S) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Route Status
Select the route status for purchase orders that are past due for shipment but are still awaiting shipment. The system retrieves values from UDC table 43/OS.

Document Type
Select the document types of the past due purchase orders that are awaiting shipment for which you want to be alerted. The system retrieves values from UDC table 43/OT.

Date Type
Select the date on which you want to base the alert. Values are retrieved from UDC 43S/DS.

Days Thru
Specify the number of days past due based on the date that you selected in the *Date Type* option. The system displays purchase orders that are awaiting shipment for which the current date exceeds the date you specify in the *Date Type* option by the number of days you specify in the *Days Thru* option

4.2.6.24 Purchase Orders Next x Days

You use the Purchase Orders Next x days to review purchase order information.

Version
Specify the version of the SRM - PO Inquiry program (P43S05) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Line Status
Select the line statuses for which you want to be alerted. The system retrieves values from UDC table 43S/IS.

Document Type
Select the document types for which you wanted to be notified that a purchase order line is at the status that is specified in the Line Status option. The system retrieves values from UDC table 43/OT.

Date Type
Select the date on which you want to base the alert. The system retrieves values from UDC table 43S/ID.

Days Thru
Enter the number of days that are represented by the variable x. The system displays purchase orders for which the date you specify in the *Date Type* option is within the number of days you specify in the *Days Thru* option.

4.2.6.25 Purchase Orders On Hold

You use the Purchase Orders On Hold to review purchase order information which is on hold.

Version
Specify the version of the SRM - PO Inquiry program (P43S05) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Line Status
Select the line statuses for which you want to be alerted. The system retrieves values from UDC table 43S/IS.

Document Type
Select the document types for which you wanted to be notified that a purchase order line is at the status that is specified in the Line Status option. Values are retrieved from UDC table 43/OT.

4.2.6.26 Purchase Orders Past Date

You use the Purchase Orders Past Date to review purchase order information.

Version
Specify the version of the SRM - PO Inquiry program (P43S05) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

Line Status
Select the line statuses for which you want to be alerted. The system retrieves values from UDC table 43S/IS.

Document Type
Select the document types for which you wanted to be notified that a purchase order line is at the status that is specified in the Line Status option. The system retrieves values from UDC table 43/OT.

Date Type
Select the date on which to base the alert. The system retrieves values from UDC table 43S/ID.

Days Thru
Specify the number of days past due based on the date you select in the *Date Type* option. The system displays purchase orders for which the current date exceeds the date you specify in the *Date Type* option by the number of days you specify in the *Days Thru* option.

4.2.6.27 Search for Payment Information

You use Search for Payment Information to locate payment records.

Version
Specify the version of the Self-Service - Supplier Payment Inquiry program (P04111) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

4.2.6.28 Search for Receipt Lines

You use Search for Receipt Lines to locate receipt records.

Version
Specify the version of the SRM - Receipt Inquiry program (P43121SS) to use. The default version is ZJDE0001.

Alert Name
Enter text to identify this alert in the portlet.

User Role
Select the user role for whom you are setting up this alert. The system checks record for the logged in user in the Supplier Master table. If there is an entry, the user is treated as a Supplier; else the user is treated as a Buyer. However, you can override the role.

4.2.6.29 View Kanban Capacity

You can access the Kanban Replenishment Capacity program (P3019) through the SRM portlet to review the forecast for kanban items. You can view the demand horizon by selecting the View Kanban Capacity task. You use this task to determine whether the existing size and the existing number of cards is appropriate to demand.

You use the View Kanban Capacity to review kanban capacity.

Version
Specify the version of the Kanban Replenishment Capacity program (P3019) to use. The default version is ZJDE0001.

Alert Name
Enter text to use to identify this alert in the portlet.

4.3 Editing the Portlet

This section provides an overview of the edit wizard and discusses how to edit alert parameters.

4.3.1 Understanding the Edit Wizard

You use the Edit Wizard to specify information for each alert such as the date to use and the number of days to use as the basis for date-sensitive alerts.

Edit settings are specific to each user so users can configure the portlet according to their individual preferences. However, as a result, you must complete the Edit Wizard for each portlet instance and each user.

Some alerts and tasks do not require configuration in the Edit Wizard.

When you edit tasks and alerts that have been configured for the buyer, you have all of the same options that you have when you edit tasks and alerts that have been configured for the supplier. In addition, you can specify a supplier address number so that the task or alert displays only records that are associated with a specific supplier. If you do not specify a supplier number, the buyer can use the task or alert to review records for all suppliers.

4.3.2 Page Used to Edit the Portlet

This is the page used to configure the portlet:

Form Name	FormID	Navigation	Usage
Configure Alert Parameters	N / A	Click	Modify Portlet Definition

4.3.3 Editing Alert Parameters

Access the Configure Alert Parameters page.

You must select additional parameters for some of the alerts that you selected. This section discusses the parameters for each of the alerts that requires additional parameters.

4.3.3.1 AdHoc Schedule Committed Not Equal Planned

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Days Thru
Enter the number of days beyond the current date for which you want to display records. The system displays only records whose start date is between the current date and the number of days that you specify beyond the current date.

4.3.3.2 AdHoc Schedule No Response From Supplier in x days

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Days Thru
Enter the number of days beyond the current date for which you want to display records. The system displays only records whose start date is between the current date and the number of days you specify beyond the current date.

Days Response
Enter the number of days represented by the variable x. The system displays ad hoc schedules for which you have received no response within the number of days that you specify.

4.3.3.3 Blanket Schedule Committed Not Equal Planned

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Days Thru
Enter the number of days beyond the current date for which you want to display records. The system displays only records whose start date is between the current date and the number of days that you specify beyond the current date.

4.3.3.4 Blanket Schedule Committed Quantity decreased from previously Committed Quantity

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Days Thru
Enter the number of days beyond the current date for which you want to display records. The system displays only records whose start date is between the current date and the number of days that you specify beyond the current date.

4.3.3.5 Blanket Schedule No Response From Supplier in x days

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Days Thru
Enter the number of days beyond the current date for which you want to display records. The system displays only records whose start date is between the current date and the number of days that you specify beyond the current date.

Days Response
Enter the number of days represented by the variable x. The system displays blanket schedules for which you have received no response within the number of days that you specify.

4.3.3.6 Blanket Schedule Planned Quantity Changed from previously generated Planned Quantity

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Days Thru
Specify the minimum number of days by which the planned quantity must have changed from the previously generated planned quantity for you to be alerted of the change.

4.3.3.7 Purchase Orders At Route Step

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

4.3.3.8 Purchase Orders At Route Step More Than x Days

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Days Thru
Enter the number of days represented by the variable x. The system displays purchase orders that have been at a specific route step for more than the number of days that you specify.

4.3.3.9 Purchase Orders At Status

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

4.3.3.10 Purchase Orders Awaiting Acknowledge

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

4.3.3.11 Purchase Orders Awaiting Acknowledgement Next x Days

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Date Type
Select the date on which you want to base the alert. The system retrieves values from UDC 43/DS.

Days Thru
Enter the number of days that represented by the variable x. The system displays purchase orders that are due to be acknowledged within the number of days that you specify.

4.3.3.12 Purchase Orders Awaiting Acknowledgement Past Due

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Date Type
Select the date on which you want to base the alert. The system retrieves values from UDC 43/DS.

Days Thru
Specify the number of days past due based on the date that you selected in the **Date Type** option. The system displays purchase orders that are awaiting acknowledgement for which the current date exceeds the date that you specify in the **Date Type** option by the number of days you specify in the **Days Thru** option.

4.3.3.13 Purchase Orders Awaiting Shipment

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

4.3.3.14 Purchase Orders Awaiting Shipment Next X Days

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Date Type
Select the date on which you want to base the alert. The system retrieves values from UDC 43S/DS.

Days Thru
Enter the number of days that are represented by the variable x. The system displays purchase orders that are awaiting shipment within the number of days that you specify.

4.3.3.15 Purchase Orders Awaiting Shipment Past Due

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Date Type
Select the date on which you want to base the alert. Values are retrieved from UDC 43S/DS.

Days Thru
Specify the number of days past due based on the date that you selected in the **Date Type** option. The system displays purchase orders that are awaiting shipment for which the current date exceeds the date you specify in the **Date Type** option by the number of days you specify in the **Days Thru** option.

4.3.3.16 Purchase Orders Next x Days

Date Type
Select the date on which you want to base the alert. The system retrieves values from UDC table 43S/ID.

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Days Thru
Enter the number of days that are represented by the variable x. The system displays purchase orders for which the date you specify in the **Date Type** option is within the number of days you specify in the **Days Thru** option.

4.3.3.17 Purchase Orders On Hold

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

4.3.3.18 Purchase Orders Past Date

Date Type
Select the date on which to base the alert. The system retrieves values from UDC table 43S/ID.

SupplierAddressNumber
Specify the address number for the supplier on whose orders you want to inquire.

> **Note:** The system displays this option only if the alert is configured for the buyer.

Days Thru
Specify the number of days past due based on the date you select in the **Date Type** option. The system displays purchase orders for which the current date exceeds the date you specify in the **Date Type** option by the number of days you specify in the **Days Thru** option.

4.4 Understanding Lean Procurement within the SRM Portlet

You can increase the efficiency of your procurement process by forecasting your demand and creating supplier release schedules for specific items. You can use the SRM portlet to expose your supplier release schedule to the supplier so that the supplier can collaborate on the schedule and be prepared to meet your demand.

You can also process kanban items in conjunction with the SRM portlet to expose your kanbans to the supplier. You can include kanban items in your supplier release schedules or you can process kanbans outside of the supplier release schedule process.

4.5 Processing Supplier Release Schedules Using the SRM Portlet

This section provides an overview of supplier release schedules within the SRM portlet, lists common fields used in this section, and discusses how to:

- Revise quantities for a blanket schedule.
- Add an ad hoc schedule.
- Revise quantities for an ad hoc schedule.

4.5.1 Understanding Supplier Release Schedules within the SRM Portlet

You can use the SRM portlet to enable your suppliers to collaborate on release schedules.

The supplier release schedule (SRS) process using the Supplier Relationship Management (SRM) portlet that consists of these major steps:

1. In the JD Edwards EnterpriseOne client, the buyer creates a forecast for the items that they purchase from a self-service supplier.

   See "Working with Detail Forecasts" in the *JD Edwards EnterpriseOne Applications Forecast Management Implementation Guide*.

2. In the JD Edwards EnterpriseOne client, the buyer creates a blanket order for the items.

   See "Working with Blanket Orders" in the *JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide*.

3. In the JD Edwards EnterpriseOne client, the buyer defines a supplier schedule with shipment date patterns.

   See "Defining Shipment Patterns" in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*.

4. In the JD Edwards EnterpriseOne client, the buyer runs a material requirements planning (MRP) generation.

   See "Generating Material Requirements Plans" in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*.

5. In the JD Edwards EnterpriseOne client, the buyer generates a supplier schedule.

   See "Generating Contract-Based Supplier Release Schedules" in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*.

   > **Note:** The buyer can also generate an ad hoc schedule for items that are not included on the blanket order.

6. The self-service supplier uses the SRM portlet to review and commit to the schedule.

   The supplier can revise the committed quantity if the buyer allows it.

7. In the JD Edwards EnterpriseOne client, the buyer releases the supplier schedule, which generates a purchase order.

   See "Releasing Supplier Schedules" in the *JD Edwards EnterpriseOne Applications Requirements Planning Implementation Guide*.

8. The self-service supplier uses the SRM portlet to review and acknowledge the purchase order.

   The purchase order then follows the standard procurement process, including purchase order acknowledgement, approval, shipment notification, receipt, and payment.

   See "Processing the Procurement Cycle" in the *JD Edwards EnterpriseOne Applications Supplier Relationship Management Collaboration Implementation Guide*.

4.5.1.1 Blanket Schedule Revisions

The buyer communicates planned and frozen orders to the supplier using EDI (electronic data interchange) or the internet. The supplier can access the Supplier Schedule Revisions program (P34301) through the SRM portlet to edit commitments (if the processing options are set to allow changes) and review cumulative planned quantities. If the supplier prefers to communicate via EDI, the supplier can still use the SRM portlet to review blanket information.

If the processing options are set to allow changes, buyers can use this program to revise the planned quantity and the committed quantity for a blanket schedule.

4.5.1.2 Ad Hoc Schedule Revisions

You can access the Adhoc Schedule Revisions program (P34302) through the SRM portlet to review and revise ad hoc schedules. If the processing options are set to allow changes, suppliers can use this program to revise the committed quantity for an ad hoc schedule and buyers can use this program to revise the planned quantity and the committed quantity for an ad hoc schedule.

Buyers can also use the Adhoc Schedule Revisions program to create ad hoc schedules. You create ad hoc schedules to collaborate with your supplier on items that are not planned within MRP, such as new item and consumable items.

4.5.2 Common Fields Used in this Section

Planned QTY (planned quantity)
Specify the quantity of units that are planned for each period in the time series or plan.

Note: Only the buyer can revise the planned quantity.

Committed QTY (committed quantity)
Specify the quantity that the supplier has committed to deliver in response to the planned quantity on the supplier schedule.

Note: Both the buyer and the supplier can revise the committed quantity.

4.5.3 Pages Used to Process Supplier Release Schedules within the SRM Portlet

These are the pages used to process Supplier Release Schedules within the SRM Portlet:

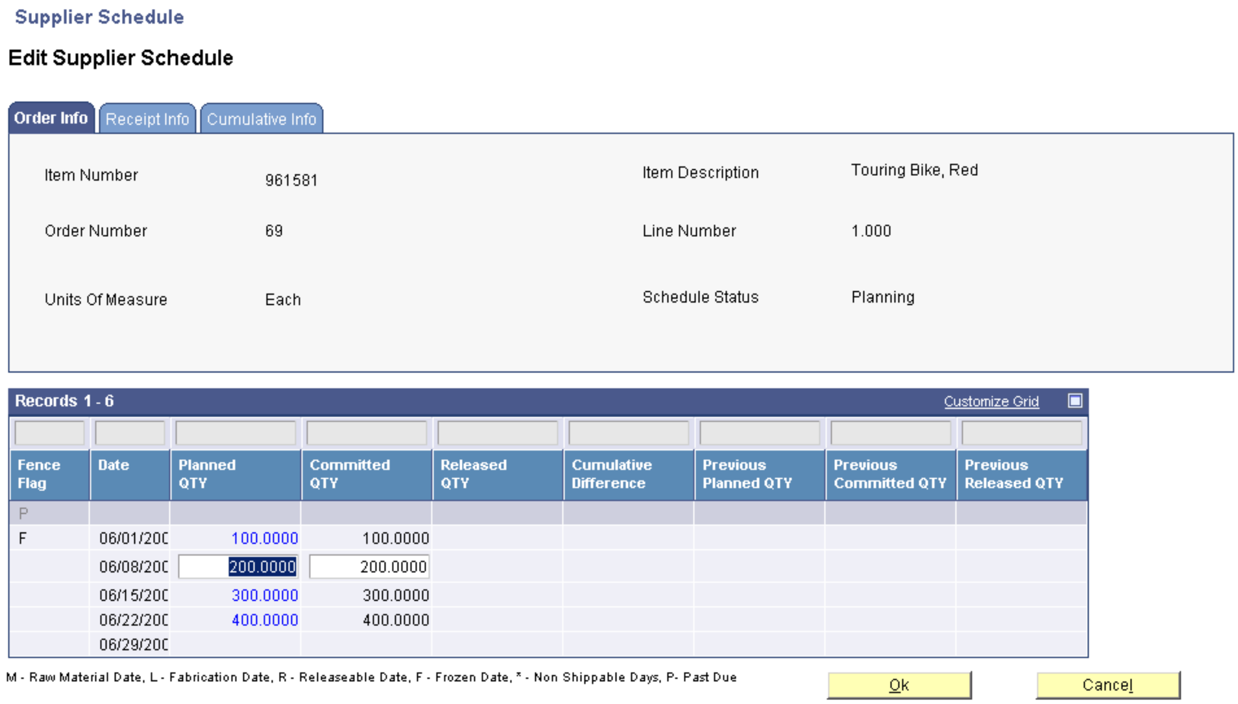
Form Name	FormID	Navigation	Usage
Search For Schedule	W34301A	Select the Blanket Schedule Advanced Search task.	Locate supplier schedules.

Form Name	FormID	Navigation	Usage
View Supplier Schedule	W34301I	Click Find on the Search For Schedule page. Select the Blanket Schedule Committed Not Equal Planned alert. Select the Blanket Schedule Committed Quantity decreased from previously Committed Quantity alert. Select the Blanket Schedule No Response from Supplier in x Days alert. Select the Blanket Schedule Planned Quantity Changed from previously generated Planned Quantity alert.	Review blanket schedule information.
Edit Supplier Schedule	W34301B	Click the Edit link for a supplier schedule line on the View Supplier Schedule page.	Revise the planned or committed quantity for a blanket order.
Search For Ad Hoc Schedules	W34302B	Select the AdHoc Schedule Advanced Search task.	Locate ad hoc schedules.
View Ad Hoc Schedules	W34302A	Click Find on the Search For Ad Hoc Schedules page. Select the AdHoc Schedule Committed Not Equal Planned alert. Select the AdHoc Schedule No Response From Supplier in x days alert.	Review ad hoc schedules.
Add Ad Hoc Schedules	W34302E	Click Add on the View Ad Hoc Schedules page.	Create an ad hoc schedule.
Edit Ad Hoc Schedules	W34302C	Click the Edit link for an ad hoc schedule on the View Ad Hoc Schedules page.	Revise the planned or committed quantity for an ad hoc schedule.

4.5.4 Revising Quantities for a Blanket Schedule

Access the Edit Supplier Schedule page.

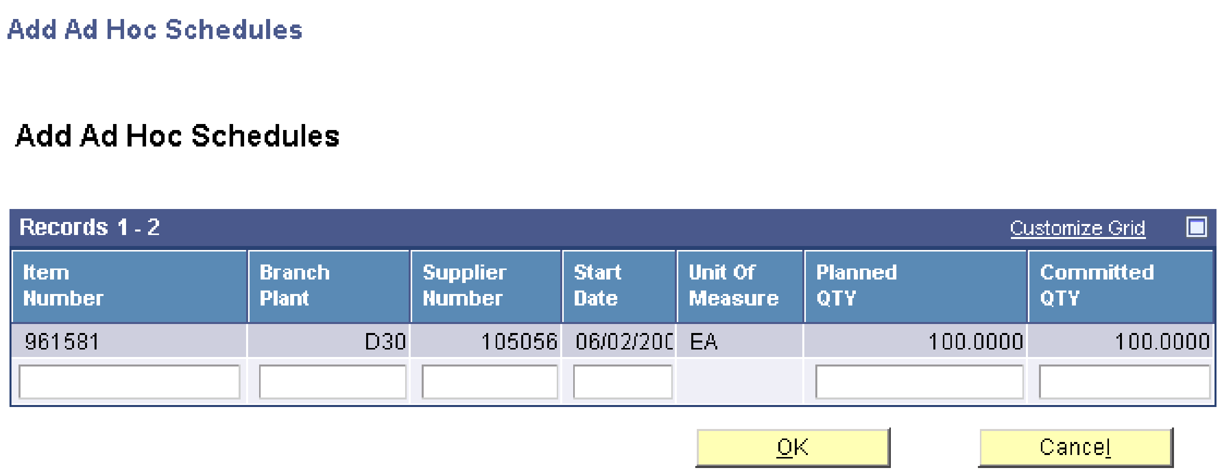
Figure 4–22 Edit Supplier Schedule page



4.5.5 Adding an Ad Hoc Schedule

Access the Add Ad Hoc Schedules page.

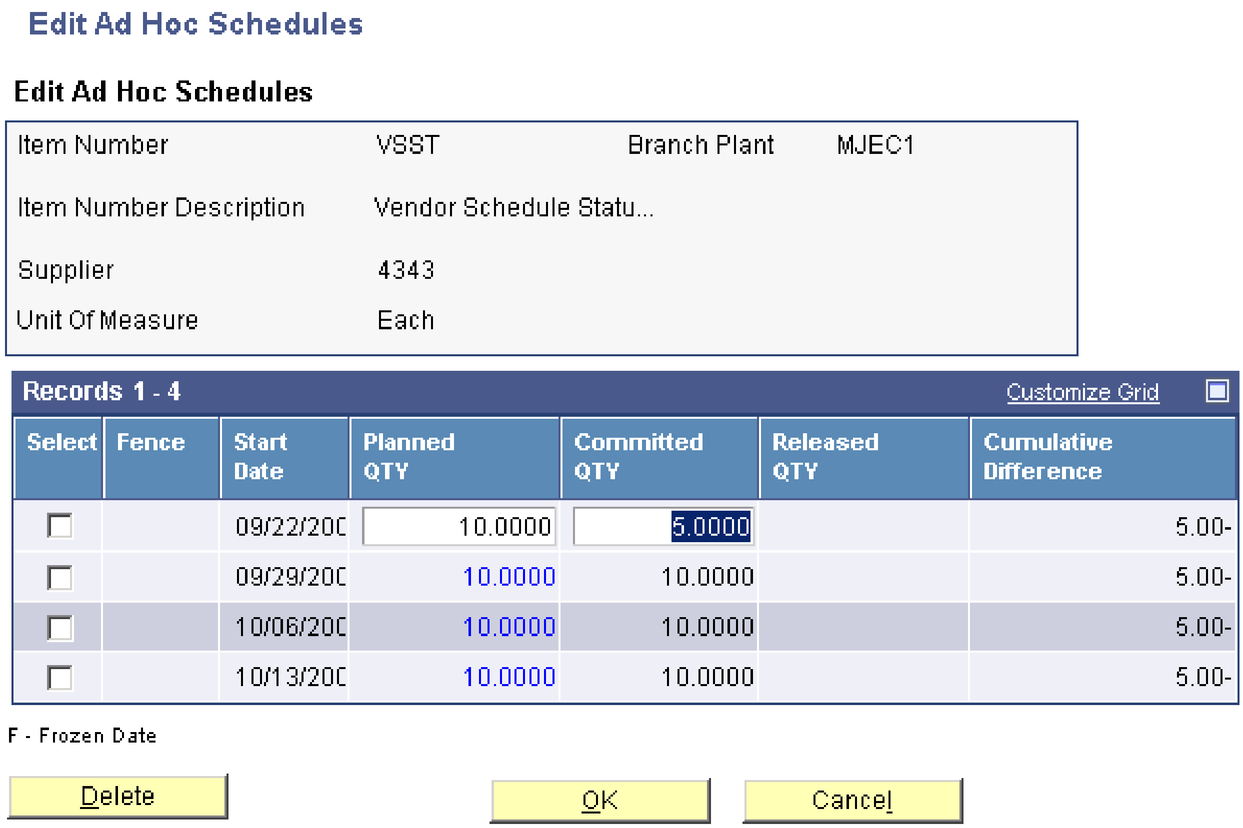
Figure 4–23 Add Ad Hoc Schedules page



4.5.6 Revising Quantities for an Ad Hoc Schedule

Access the Edit Ad Hoc Schedules page.

Figure 4–24 Edit Ad Hoc Schedules page



4.6 Processing Kanbans Using the SRM Portlet

This section provides an overview of kanban processing using the SRM portlet and lists the pages to review kanban capacity in the SRM portlet.

4.6.1 Understanding Kanban Processing using the SRM Portlet

Kanban Management enables you to streamline the day-to-day functions of your shop floor and associated departments. Kanbans are visual cues that authorize the replenishment of inventory at a specified consuming location in a pull environment. When kanban inventory is consumed, a replenishment action is triggered when the holding bin is emptied.

You can use the kanban process in conjunction with the SRM portlet for type 3 (supplier) and type 4 (outside assembly) kanbans.

Note: You can also use the SRM portlet for type 4 (outside assembly) and type 5 (transfer order) kanbans, but the process is different. The process described here pertains to type 3 kanbans only.

A typical kanban process using the SRM portlet includes these steps:

1. The buyer checks out a kanban card using the Kanban Consumption program (P3157), which creates a purchase order.

2. The supplier accesses the SRM portlet and acknowledges the order and confirm shipment of the order using the standard procurement process.

Note: You must set up order activity rules for the kanban type and make sure that your SRM portlet alerts are set up to use the appropriate statuses.

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3. The buyer accesses the Collaborative Portal and notices that a new kanban order is in transit.
4. The buyer checks in the kanban program using the Kanban Consumption program.

   For a two-step kanban, the buyer checks in the kanban and then receives the kanban. For a single-step kanban, there is no check-in process. The system checks in the kanban when the buyer receives it.
5. The buyer receives the kanban order.

4.6.1.1 Setting Up the SRM Portlet for Kanban Processing

You can use the SRM portlet within the SRM portlet to monitor the kanban process by setting up the alerts within the SRM portlet to display orders with a kanban order type. For example, you might create an instance of the SRM portlet with these alerts and inquiries:

Available Item	Modified Description
Purchase Orders Awaiting Acknowledge	Kanban Orders Awaiting Acknowledgement
Purchase Orders Awaiting Acknowledgement Past Due	Kanban Orders Acknowledgement Past Due
Purchase Orders Awaiting Shipment	Kanban Orders Awaiting Shipment
Purchase Orders Awaiting Shipment Past Due	Kanban Orders Shipment Past Due
Purchase Orders At Status	Kanban Orders In Transit
View Kanban Capacity	Kanban Inquiry
Demand Greater Than Capacity	Kanban Demand Greater Than Capacity
Demand Greater Than Capacity	Kanban Capacity Greater Than Demand

For all of the purchase order alerts (Purchase Orders Awaiting Acknowledge, Purchase Orders Awaiting Shipment, and so on), specify the document type for kanban orders when you set up the parameters.

4.6.1.2 Viewing Kanban Capacity

You can access the Kanban Replenishment Capacity program (P3019) through the SRM portlet to review the forecast for kanban items. You can view the demand horizon by selecting the View Kanban Capacity task. You use this task to determine whether the existing size and the existing number of cards is appropriate to demand.

You can view only orders for which the demand exceeds capacity or the capacity exceeds demand using the Demand Greater Than Capacity alert.

4.6.1.3 Kanban Orders and Supplier Release Scheduling

You can create supplier release schedules for kanban items to expose your forecast for these items. However, you do not create purchase orders within the supplier release schedule process because the system creates purchase orders within the kanban process.

Note: If you designate an item as a kanban item, the system automatically suppresses purchase order generation for that item during the supplier release schedule process.

4.6.2 Pages Used to Review Kanban Capacity in the SRM Portlet

This table shows the pages used to review Kanban Capacity in the SRM Portlet.

Form Name	FormID	Navigation	Usage
View Kanban Capacity	W3019B	Use either of these navigations: Select the View Kanban Capacity task. Select the Demand Greater Than Capacity alert.	Review kanban capacity.

5 Understanding CSS Portlets

This chapter contains the following topics:

- Section 5.1, "Using CSS Portlets"
- Section 5.2, "Accessing Portal Application Portlets"
- Section 5.3, "Understanding CSS Portlets"
- Section 5.4, "Using the CSS for Sales Portlets"
- Section 5.5, "Using the CSS for Service Portlets"
- Section 5.6, "Using the CSS for Support Portlets"

5.1 Using CSS Portlets

This section discusses Customer Self Service portlets and portal access.

This section of the guide should be used in conjunction with the *JD Edwards EnterpriseOne Customer Self-Service Implementation Guide*

5.1.1 Customer Self Service Portlets

Customer Self Service portlets enable you access JD Edwards EnterpriseOne applications, Web-based content, and other resources in order to utilize cases, solution advisor, equipment, service contracts, and service work orders:

Functional Area	Portlet Functions
Cases	▪ View cases pertaining to the customer, listed in ascending priority order. ▪ Add new cases. ▪ Update existing cases. ▪ View or process an existing case's history. ▪ Search open cases, closed cases, and cases in the last 30 days.
Solution Advisor	Troubleshoot case or service order issues.
Equipment	▪ View equipment records pertaining to the customer, listed in ascending description order. ▪ Add new equipment records. ▪ Search an equipment record using the equipment number.

Functional Area	Portlet Functions
Service Work Order	■ View service orders pertaining to the customer. Also view associated equipment records and cases. ■ Search for a service work order.
Service Contracts	■ View service contracts pertaining to the customer. ■ List expired contracts and future contracts.
Sales Orders	■ ■ Search for orders, invoices and shipments. ■ Perform CSS tasks. ■ Review account balance. ■ Review receivables status. ■ Review account aging.

Portlets are grouped by type, which means that portlet applications for service and support appear in two different places. After you sign in to the Customer Self Service portal you then specify a place. Portlet applications are grouped in the CSS for Service or CSS for Support places. Here are the portlet applications for each place:

CSS For Service Portlets	CSS For Support Portlets
Service Tasks ■ Add Equipment ■ View Equipment ■ View Work Orders ■ View Contracts	Support Tasks ■ View Cases ■ Add New Cases
Service Search	Support Search 1. Support Search 2. Support Alerts 3. Solution Advisor

5.1.2 Portal Access

Portals are Web-based, so you access the Customer Self Service portal by opening a window in a Web browser such as Microsoft Internet Explorer. The implementation team that installed and configured the JD Edwards EnterpriseOne Customer Self Service application software should have provided you with a URL (Universal Resource Locator) to access the portal.

After launching the Web browser, enter the URL in the browser's Address field. (Alternatively, the implementation team might have added a shortcut to the portal in your Favorites.) The portal Welcome page appears.

5.1.3 Additional Information

Because portlets contain a subset of the functionality contained in the JD Edwards EnterpriseOne applications, features and tasks are not fully described in this section. For example, this section does not describe how to add a new service order because that information is described in another guide.

See also *JD Edwards EnterpriseOne Applications Service Management Implementation Guide* and *JD Edwards EnterpriseOne Applications Customer Relationship Management for Support Implementation Guide*.

5.2 Accessing Portal Application Portlets

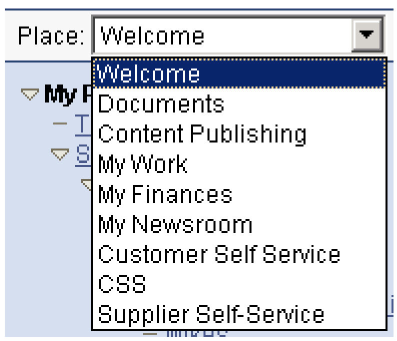
This section discusses how to access portal application portlets.

5.2.1 Accessing Portal Application Portlets

Access the portal Welcome page.

1. Click the Sign In link in the upper right corner.
2. On the standard JD Edwards EnterpriseOne sign-in form, enter your user ID and password to enter the portal.
3. At the Place menu, select CSS for Service or CSS for Support. After you select one of these portal places, the application portlet windows for that place appear.

Figure 5–1 Place menu



5.3 Understanding CSS Portlets

JD Edwards EnterpriseOne Customer Self Service portlets enables customers access to their information, provides them with timely and accurate information, and allows them to:

- Perform administrative tasks.
- Search for orders, invoices, shipments.
- Perform CSS tasks.
- Review account balance.
- Review receivables status.
- Review account aging.

5.3.1 CSS Administrator Tasks (P42S01)

The Administrator Tasks portlet enables URLs to be selected that will:

- Manage User Profiles
- Manage User Passwords

Figure 5–2 Administrator Tasks Portlet

5.4 Using the CSS for Sales Portlets

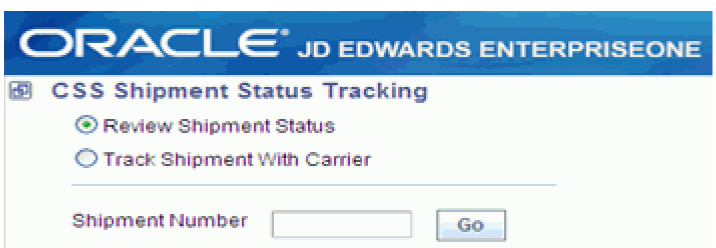
This section discusses the portlets available for sales tasks.

5.4.1 Shipment Status Tracking (P42S02)

The Shipment Status Tracking portlet enables customers to:

- Review Shipment Status
- Track Shipment With Carrier

Figure 5–3 Shipment Status Tracking Portlet

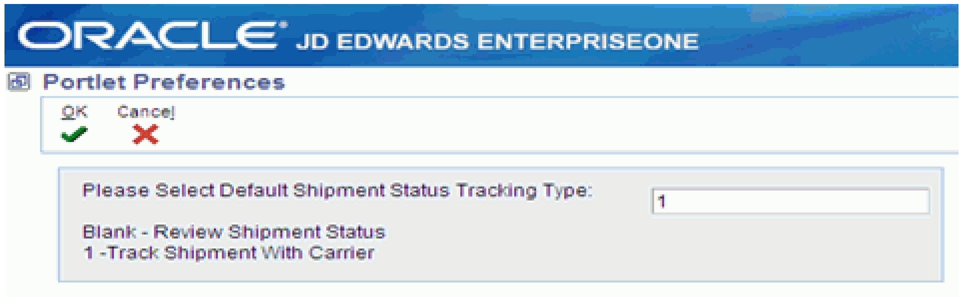


Selecting the Personalize icon will enable the radio button selections to be pre-selected.

Value	Selection
Blank	Review Shipment Status
1	Track Shipment With Carrier

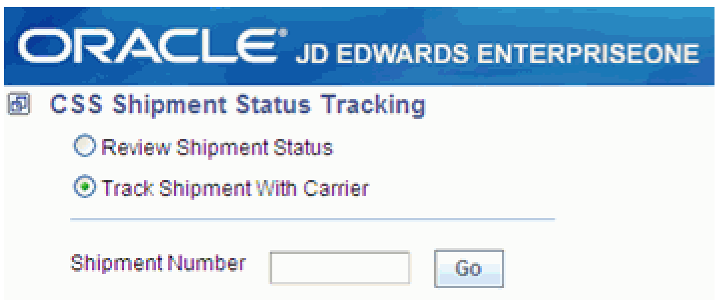
In this example we will pre-select Track Shipment With Carrier by entering a 1 in the Please Select Default Shipment Status Tracking Type field.

Figure 5–4 Shipment Status Tracking Portlet Personalization Preferences



This will result in the CSS Shipment Status Tracking portlet being presented with the Track Shipment With Carrier radio button already selected by default.

Figure 5–5 Shipment Status Tracking Portlet Example

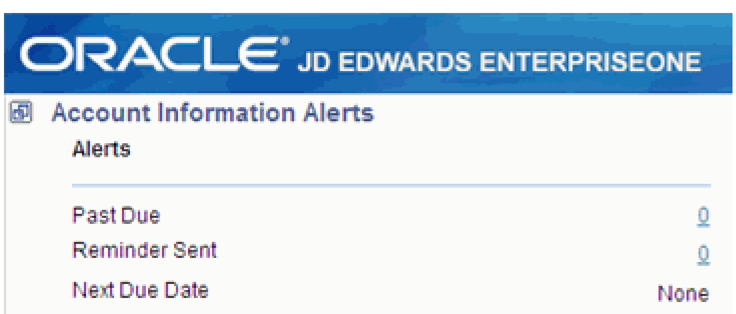


5.4.2 Receivables Status (P42S03)

The Receivables Status portlet enables customers to monitor account information alerts for:

- Accounts past due.
- Accounts where a past due reminder has been sent.
- Next Due Date.

Figure 5–6 Receivables Status Portlet



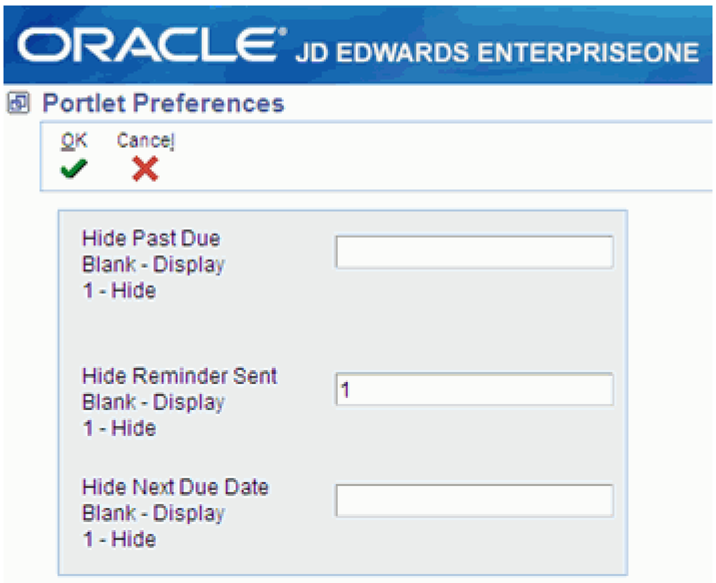
Selecting the Personalize icon will enable the alert selections to be pre-selected.

Selection	Value	Result
Hide Past Due	Blank	Display

Selection	Value	Result
Hide Past Due	1	Hide
Hide Reminder Sent	Blank	Display
Hide Reminder Sent	1	Hide
Hide Next due Date	Blank	Display
Hide Next due Date	1	Hide

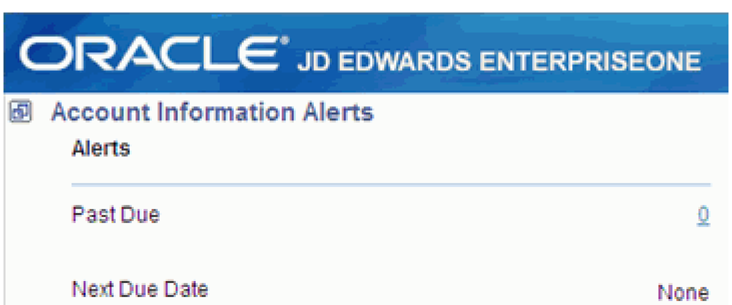
In this example we will pre-select Reminder Sent by entering a 1 in the Hide Reminder Sent field.

Figure 5–7 Receivables Status Portlet Personalization Preferences



This will result in the Receivables Status portlet being presented with Past Due displayed, Reminder Sent hidden, and Next Due Date as the default display.

Figure 5–8 Receivables Status Portlet Example



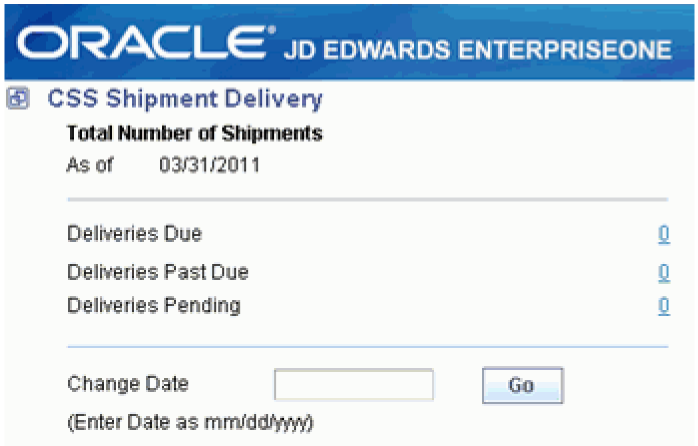
5.4.3 Shipment Delivery Information (P42S04)

The Shipment Delivery Information portlet enables customers to monitor account information and alerts for:

- As of date.

- Deliveries Due.
- Deliveries Past Due.
- Deliveries Pending.
- Change Date.

Figure 5–9 Shipment Delivery Information Portlet

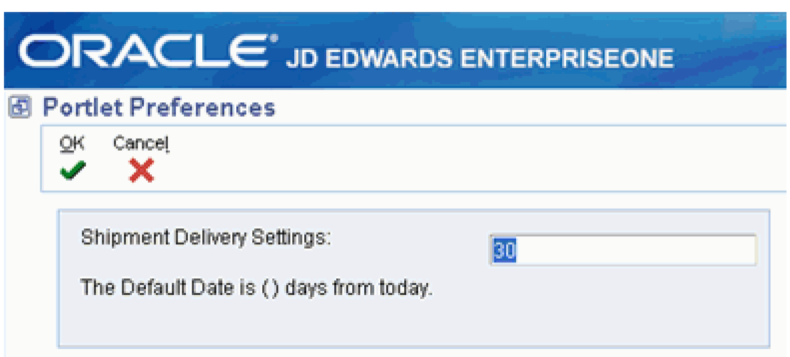


Selecting the Personalize icon will enable the *As of* date to be pre-selected.

Selection	Value	Result
Shipment Delivery settings	Enter a number to set the number of default days from today.	This will display the number of days.

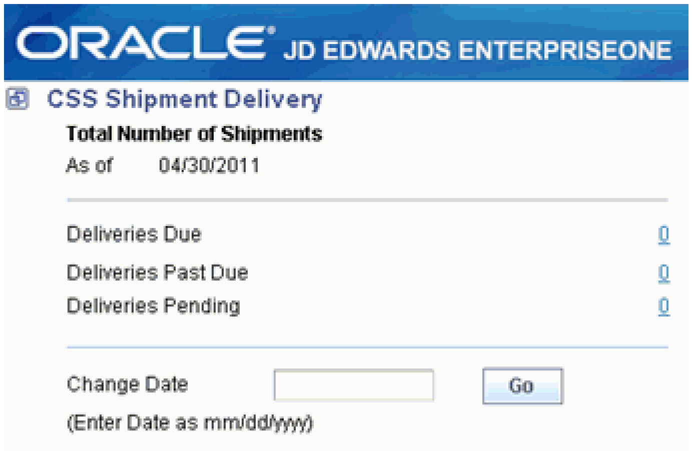
In this example we set the Shipment Delivery Settings by entering 30 days as the default date setting.

Figure 5–10 Shipment Delivery Information Portlet Personalization Preferences



This will result with the Shipment Delivery Settings being presented with the As of presented as 30 days from today's date.

Figure 5–11 Shipment Delivery Information Portlet Example

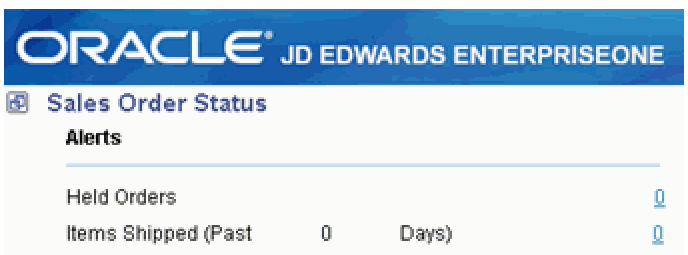


5.4.4 Customer Order Status (P42S05)

The Customer Order Status portlet enables customers to monitor alerts for:

- Held Orders.
- Items Shipped (Past x number of Days)

Figure 5–12 Customer Order Status Portlet

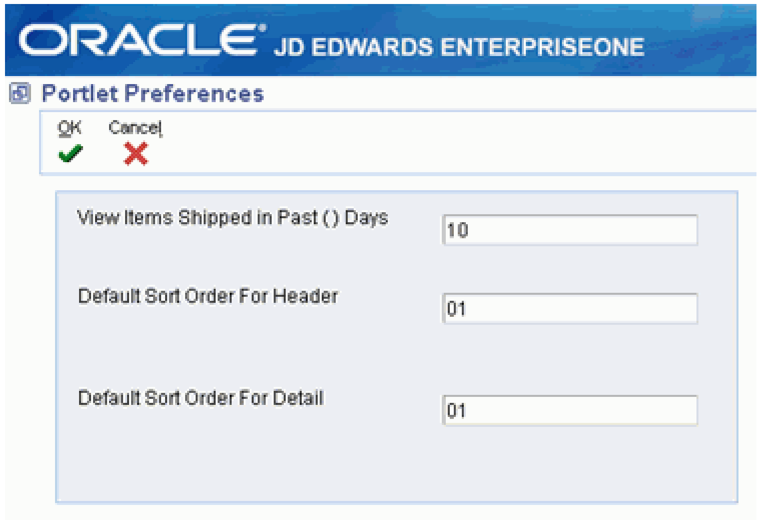


Selecting the Personalize icon will enable the alert selections to be pre-selected.

Selection	Value	Result
View Items Shipped in Past ( ) Days	Number	Displays items shipped in last x days.
Default Sort Order for Header	01	Sets default sort order for header.
Default Sort Order for Detail	01	Sets default sort order for detail.

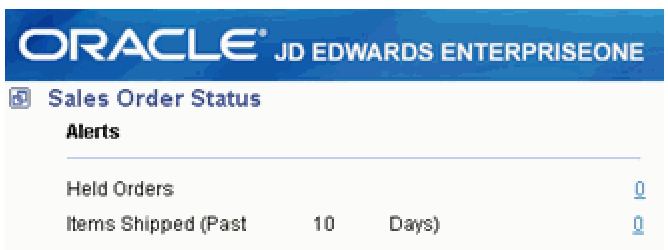
In this example we will pre-select View Items Shipped in Past ( ) Days and enter 10 to display items shipped in last 10 days. In the Default Sort Order for Header field we will enter 01. In the Default Sort Order for Detail field we will also enter 01.

Figure 5–13 Customer Order Status Portlet Personalization Preferences



This will result with the Items Shipped being calculated based on activity in the last 10 days.

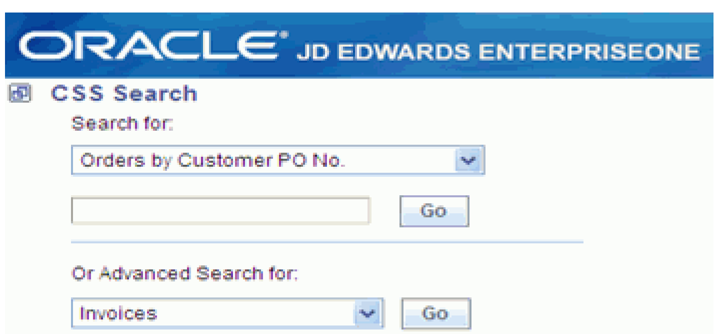
Figure 5–14 Customer Order Status Portlet Example



5.4.5 CSS Search - (P42S06)

The CSS Search portlet enables customers to do searches based on various criteria. There is a default and advanced search type.

Figure 5–15 CSS Search Portlet



Selecting the Personalize icon will enable the default and advanced search type to be pre-selected.

This table shows the pre-selected options for the default search type:

Value	Selection
Blank	Orders by Customer PO No.
1	Orders by Sales Order No.
2	Invoices by Sales Invoice No.
3	Invoices by Sales Order No.
4	Shipments by Shipment No.
5	Accounts by Invoice No.
6	Forecasts by Item No.
7	Customer Item by Customer Item No.
8	Customer Item by Supplier Item No.

This table shows the pre-selected options for the advanced search type:

Value	Selection
Blank	Orders
1	Invoices
2	Inventory
3	Shipments
4	Account Information
5	Forecasts
6	Customer Item No.

In this example we will pre-select the Default Search Type and enter 3. We will pre-select the Advanced Search Type and enter 5.

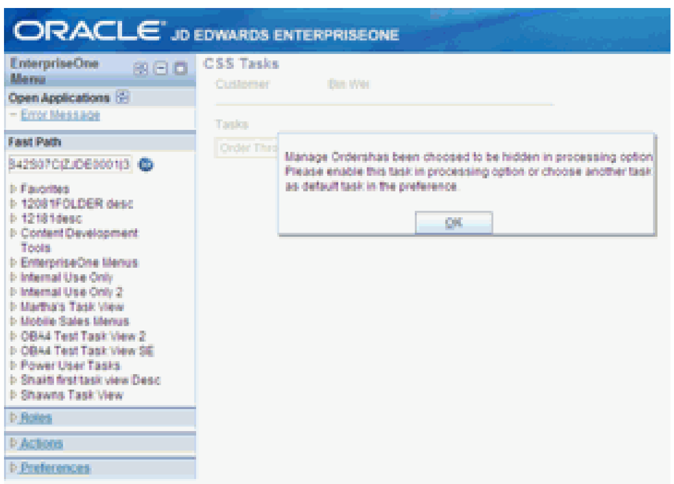
Figure 5–16 CSS Search Portlet Personalization Preferences

This will result with the Default Search Type displaying Invoices by Sales invoice No. by default and the Advanced Search Type displaying Forecasts by default.

Figure 5–17 CSS Search Portlet Example

An error message will be issued if the search type is chosen to be hidden in the Processing Option.

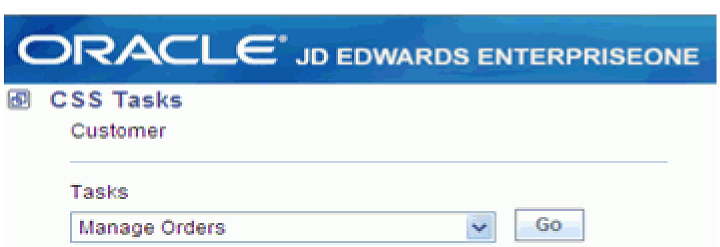
Figure 5–18 CSS Search Portlet Error



5.4.6 CSS Tasks - (P42S07)

The CSS Tasks portlet enables customers to display tasks.

Figure 5–19 CSS Tasks Portlet



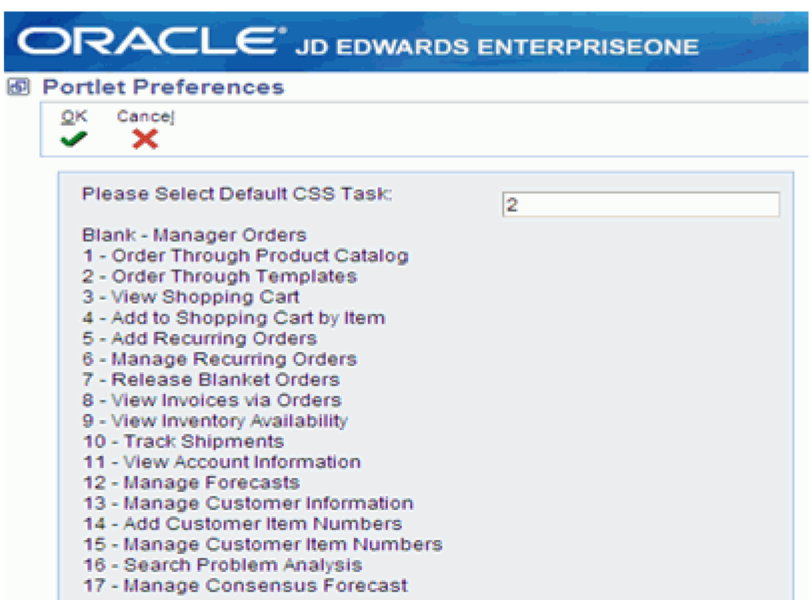
Selecting the Personalize icon will enable a default task to be pre-selected.

This table shows the pre-selected options for the default task:

Value	Selection
Blank	Manage Orders
1	Order Through Product Catalog
2	Order Through Templates
3	View Shopping Cart
4	Add to Shopping Cart by Item
5	Add Recurring Orders
6	Manage Recurring Orders
7	Release Blanket Orders
8	View Invoices via Orders
9	View Inventory Availability
10	Track Shipments
11	View account Information
12	Manage Forecasts
13	Manage Customer Information
14	Add Customer Item Numbers
15	Manage Customer Item Numbers
16	Search Problem Analysis
17	Manage Consensus Forecast

In this example we will pre-select the Order Through Templates default selection and enter 2.

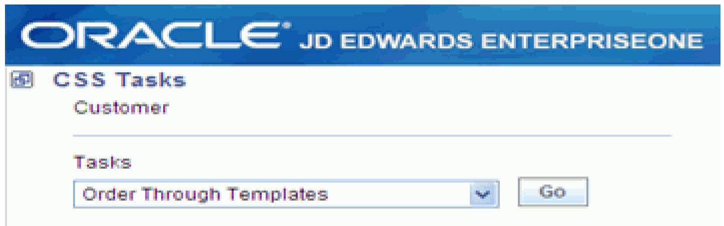
Figure 5–20 CSS Tasks Portlet Personalization Preferences



This will result with Order Through Templates being displayed as the default task.

Note: An error message will be issued if the search type is chosen to be hidden in the Processing Option.

Figure 5–21 CSS Tasks Portlet Example



5.4.7 Customer Alerts - (P42S08)

The Customer Alerts portlet enables account, order, and shipment alerts to be displayed.

Account alerts contain:

- Past due
- Reminder sent
- Next Due Date

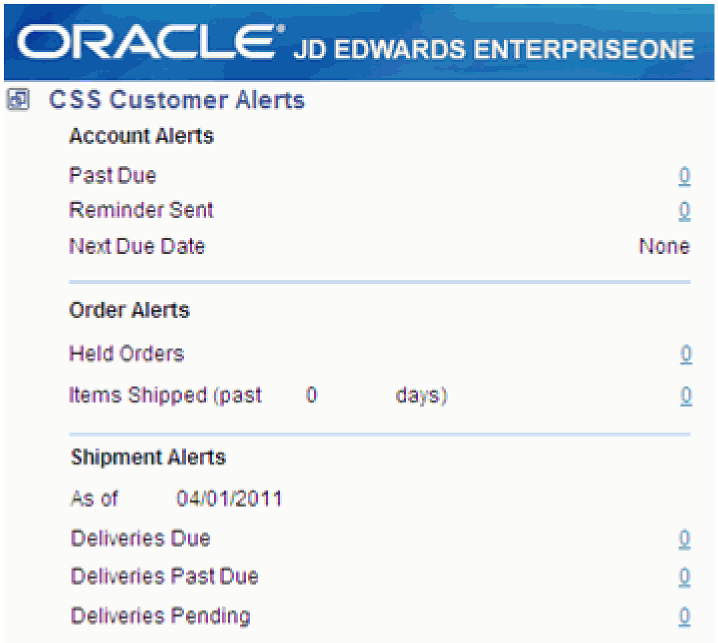
Order alerts contain:

- Held Orders
- Items Shipped (past x days)

Shipment alerts contain:

- As of date
- Deliveries Due
- Deliveries Past Due
- Deliveries Pending

Figure 5–22 Customer Alerts Portlet



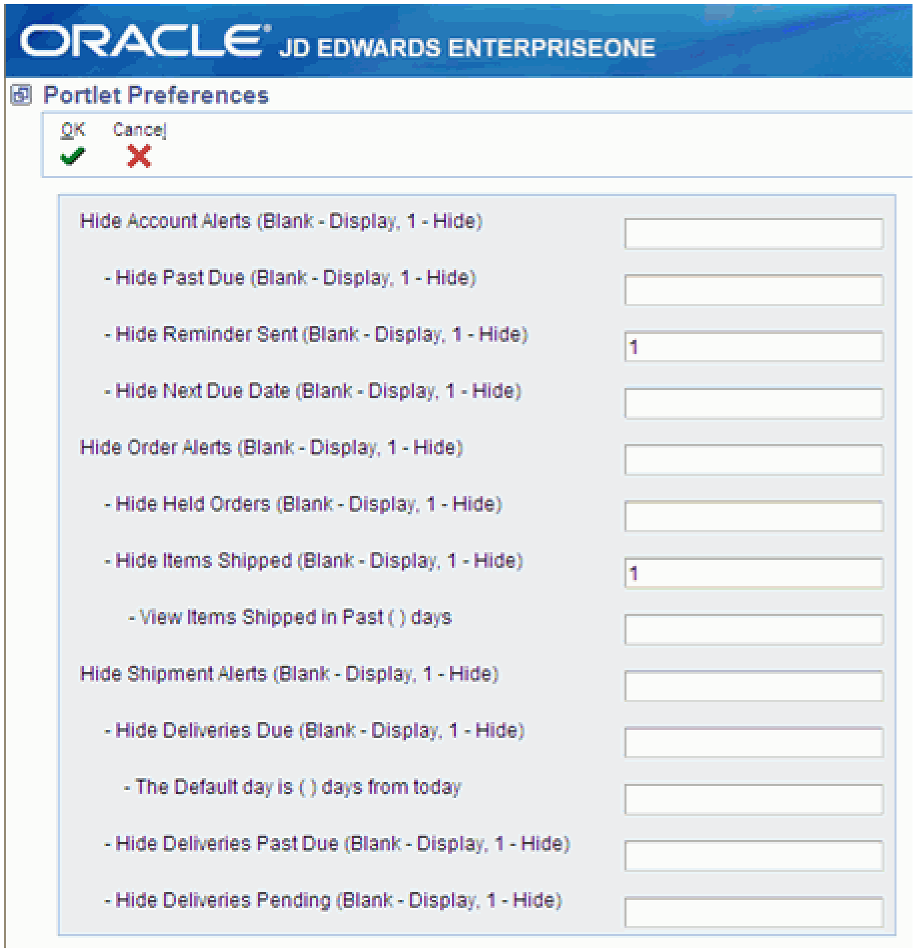
Selecting the Personalize icon will enable default alerts to be pre-selected.

This table shows the pre-selected options for the default task:

Selection	Value/Result
Hide Account Alerts	Blank = Display, 1 = Hide
Hide Past Due	Blank = Display, 1 = Hide
Hide Reminder Sent	Blank = Display, 1 = Hide
Hide Next due Date	Blank = Display, 1 = Hide
Hide Order Alerts	Blank = Display, 1 = Hide
Hide Held Orders	Blank = Display, 1 = Hide
Hide Items Shipped	Blank = Display, 1 = Hide
View Items Shipped in Past	Blank = Display, 1 = Hide
Hide Shipment Alerts	Blank = Display, 1 = Hide
Hide Deliveries Due	Blank = Display, 1 = Hide
The Default day is ( ) days from today	Blank = Display, 1 = Hide
Hide Deliveries Past Due	Blank = Display, 1 = Hide
Hide Deliveries Pending	Blank = Display, 1 = Hide

In this example we will pre-select Hide Reminder Sent and Hide Items Shipped and hide both by using a value of 1. Since the others selections will be left blank, they will all display.

Figure 5–23 Customer Alerts Portlet Personalization Preferences



This will result in Hide Reminder Sent and Hide Items Shipped being hidden by default when this portlet displays.

Figure 5–24 Customer Alerts Portlet Example

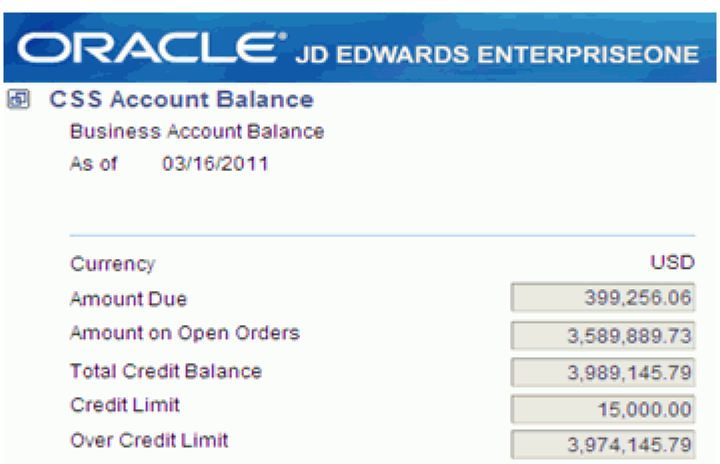
5.4.8 Account Balance (P42S09)

The CSS Account Balance portlet will display account balance information based on an As of date.

The fields that display are:

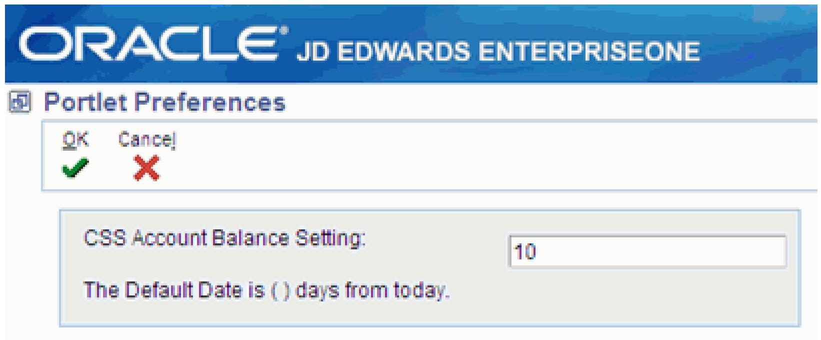
- Currency
- Amount Due
- Amount on Open Orders
- Total Credit Balance
- Credit Limit
- Credit Available

Figure 5–25 Account Balance Portlet



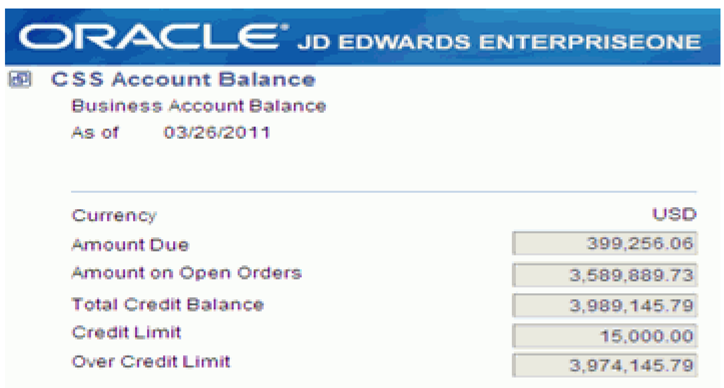
Selecting the Personalize icon will enable the CSS Account Balance Setting to be pre-entered. This setting is for the number of days from today that will be used to establish the As of date based on the number of days entered. This will determine the default As of date.

Figure 5–26 Account Balance Portlet Personalization Preferences



The calculations for all of the fields will be based on the As of date.

Figure 5–27 Account Balance Portlet Example



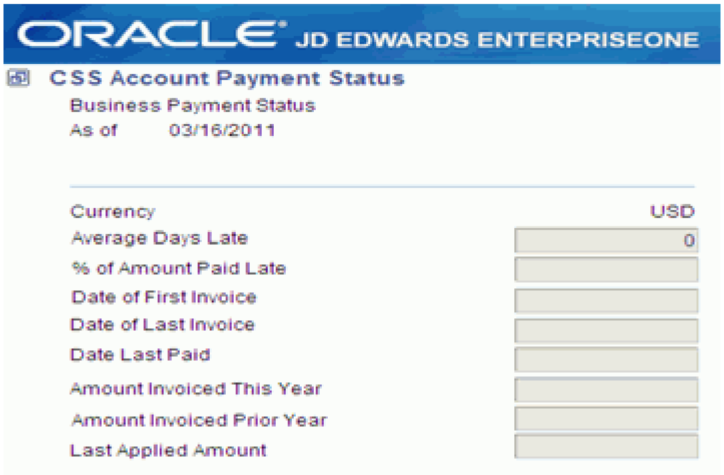
5.4.9 Account Payment Status (P42S10)

The Account Payment Status portlet will display account balance information based on an As of date.

The fields that display are:

- Currency
- Average Days Late
- % of Amount Paid Late
- Date of First Invoice
- Date of Last Invoice
- Date Last Paid
- Amount Invoiced This Year
- Amount Invoiced Prior Year
- Last Applied Amount

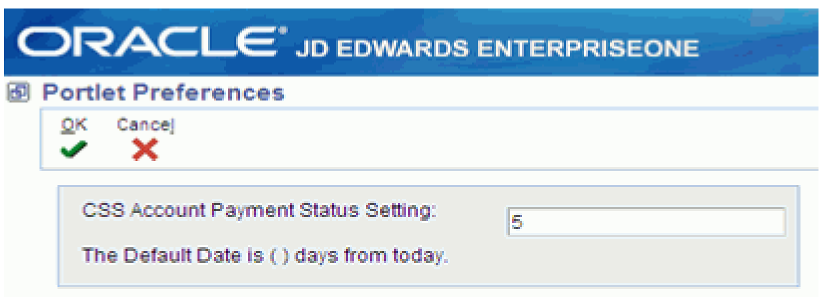
Figure 5–28 Account Payment Status Portlet



Selecting the Personalize icon will enable the CSS Account Payment Balance Setting to be pre-entered. This setting is for the number of days from today that will be used to establish the As of date based on the number of days entered. This will determine the default As of date.

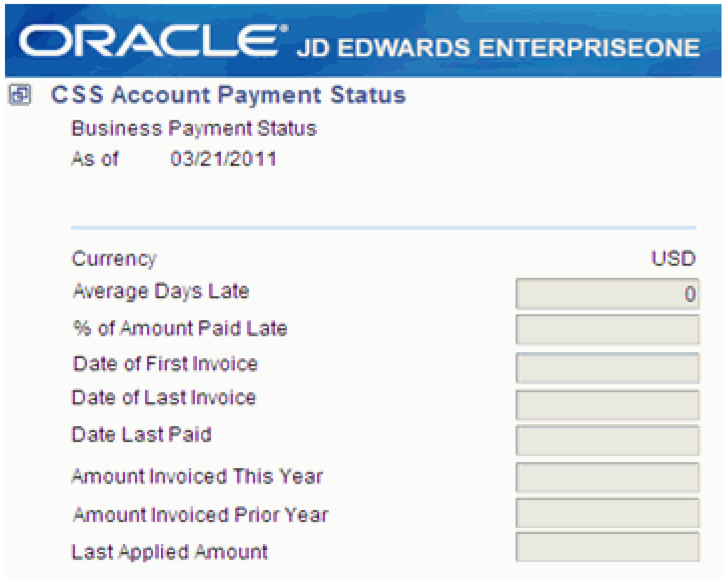
In this example, 5 is entered into the CSS Account Payment Balance Setting field. The default As of date will now be the current date plus 5 days.

Figure 5–29 Account Payment Status Portlet Personalization Preferences



Whereas the previous As of date was 3/16/2011, the new As of date is now 3/21/2011 since we have used the Personalize option to change the default day by adding five days to the date.

Figure 5–30 Account Payment Status Portlet Example



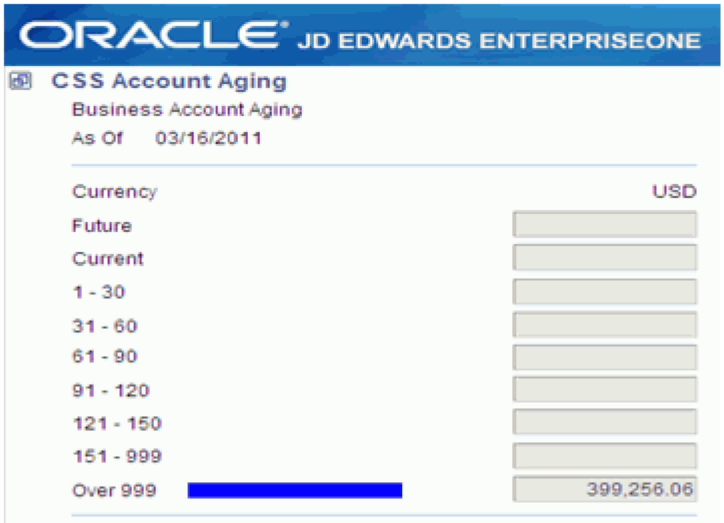
5.4.10 Account Aging (P42S11)

The Account Aging portlet will display aging information based on an As of date.

The fields that display are:

- Currency
- Future
- Current
- 1 - 30
- 31 - 60
- 61 - 90
- 91 - 120
- 121 - 150
- 151 - 999
- Over 999

Figure 5–31 Account Aging Portlet



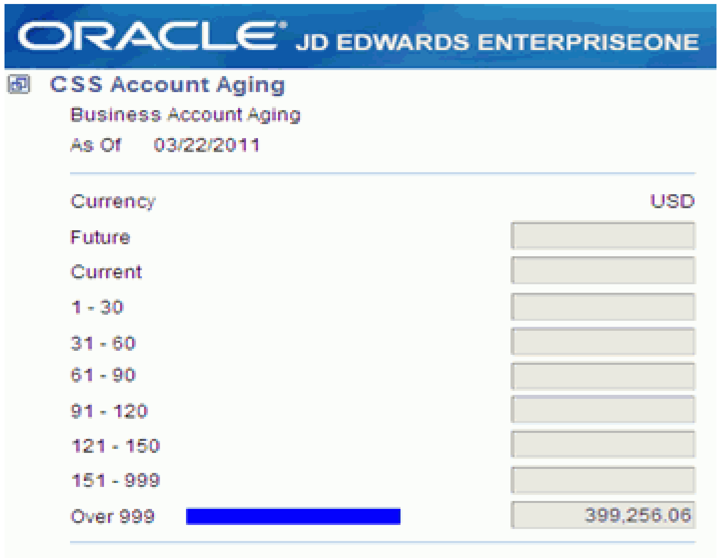
Selecting the Personalize icon will enable the CSS Account Aging Setting to be pre-entered. This setting is for the number of days from today that will be used to establish the As of date based on the number of days entered. This will determine the default As of date.

In this example, 6 is entered into the CSS Account Aging Setting field. The default As of date will now be the current date plus 6 days.

Figure 5–32 Account Aging Portlet Personalization Preferences

Whereas the previous As of date was 3/16/2011, the new As of date is now 3/22/2011 since we have used the Personalize option to change the default day by adding six days to the date.

Figure 5–33 Account Aging Portlet Example



5.5 Using the CSS for Service Portlets

This section discusses how to:

- Add equipment through the Service Tasks portlet.
- View equipment through the Service Tasks portlet.
- View work orders through the Service Tasks portlet.
- View contracts and entitlements through the Service Tasks portlet.
- Use the Service Search portlet.

5.5.1 Forms Used by the CSS for Service Portlets

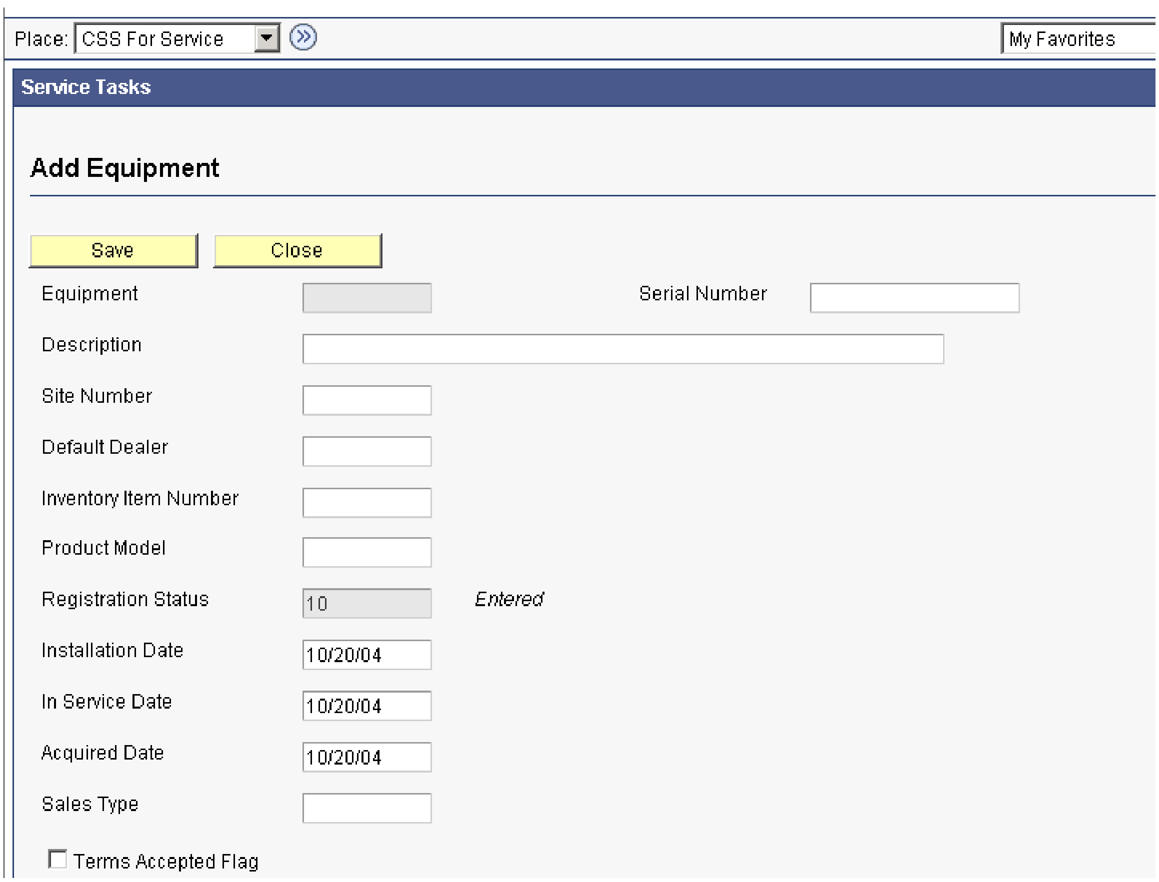
Form Name	FormID	Navigation	Usage
Add Equipment	W90CD920A	Select CSS for Service from the portal's Place menu. Click Add Equipment in the Service Tasks window.	Add a new equipment record.
View Equipment	W90CD920C	Select CSS for Service from the portal's Place menu. Click View Equipment in the Service Tasks window. Alternatively, select one of the equipment search options in the Service Search window's Search For menu, and then click Go.	View existing equipment record information.

Form Name	FormID	Navigation	Usage
View Service Work Orders	W90CD910C	Select CSS for Service from the portal's Place menu. Click View Service Work Orders in the Service Tasks window. Alternatively, select one of the work order search options in the Service Search window's Search For menu, and then click Go.	View service work order information.
View Service Contracts and Entitlements	W90CD900A	Select CSS for Service from the portal's Place menu. Click View Contracts in the Service Tasks window. Alternatively, select one of the contract search options in the Service Search window's Search For menu, and then click Go.	View service contract information.

5.5.2 Adding Equipment Through the Service Tasks Portlet

Access the Add Equipment form.

Figure 5–34 Add Equipment form



Description
Enter a brief description for the equipment.

Site Number
Enter the address book number that corresponds to the site where the equipment will reside.

Default Dealer
Enter the address book number that corresponds to the dealer who is the default equipment provider.

Inventory Item Number
Enter the system-assigned item number.

Product Model
Enter the code that classifies an inventory item into a model for customer service.

Installation Date
Enter the date on which the contract for the equipment asset was put into effect.

In Service Date
Enter the date on which the equipment was placed into service.

Acquired Date
Enter the date on which the equipment asset was acquired. This date is typically the start depreciation date, but you can specify a different start depreciation date on the Depreciation Information form. If you are using the half-year convention, you must manually adjust the start depreciation date.

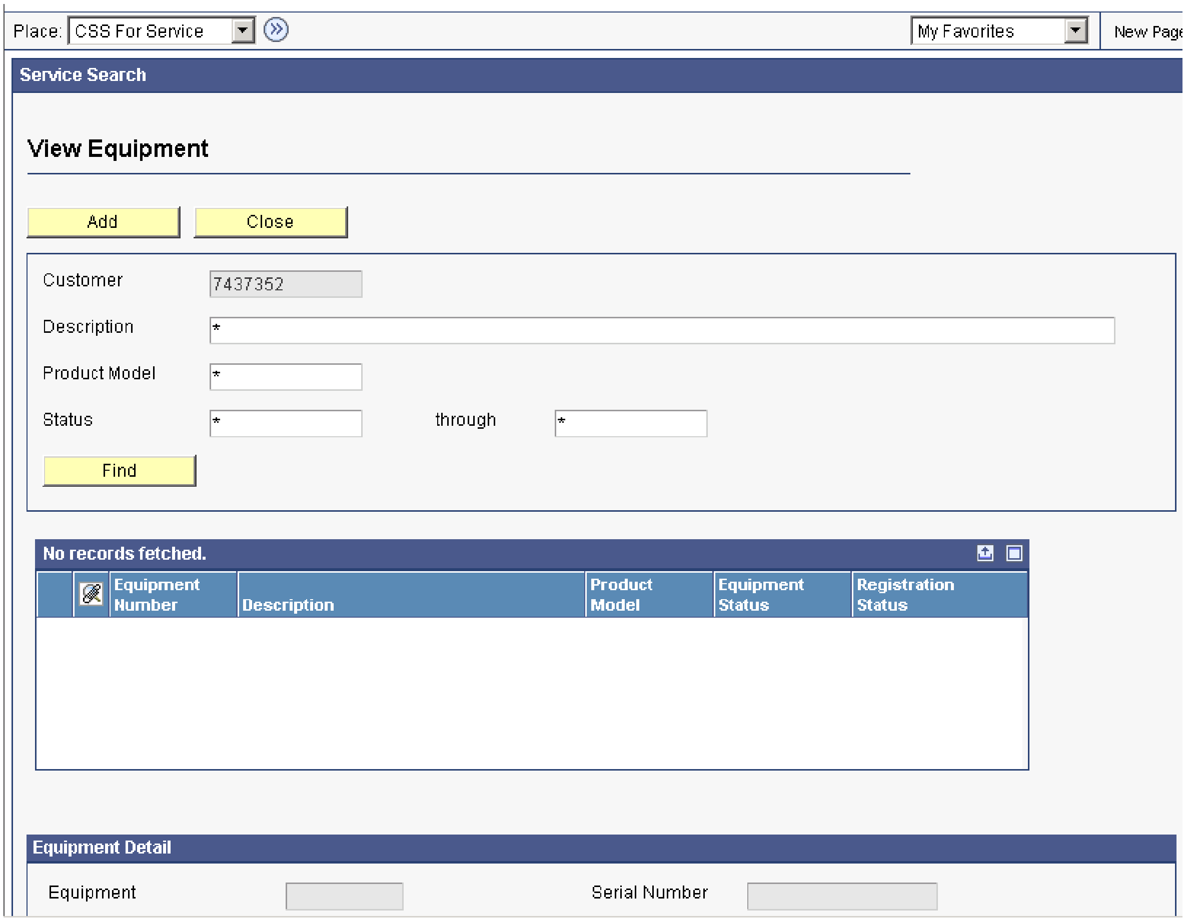
Sales Type
Enter the user defined code (system SY, type 17) that indicates the sales type for the equipment.

Terms Accepted Flag
Enter the code that indicates whether the owner of the equipment has agreed to the terms and conditions presented regarding the equipment ownership.

5.5.3 Viewing Equipment Through the Service Tasks Portlet

Access the View Equipment form.

Figure 5–35 View Equipment form



Description
Enter a brief description for the equipment.

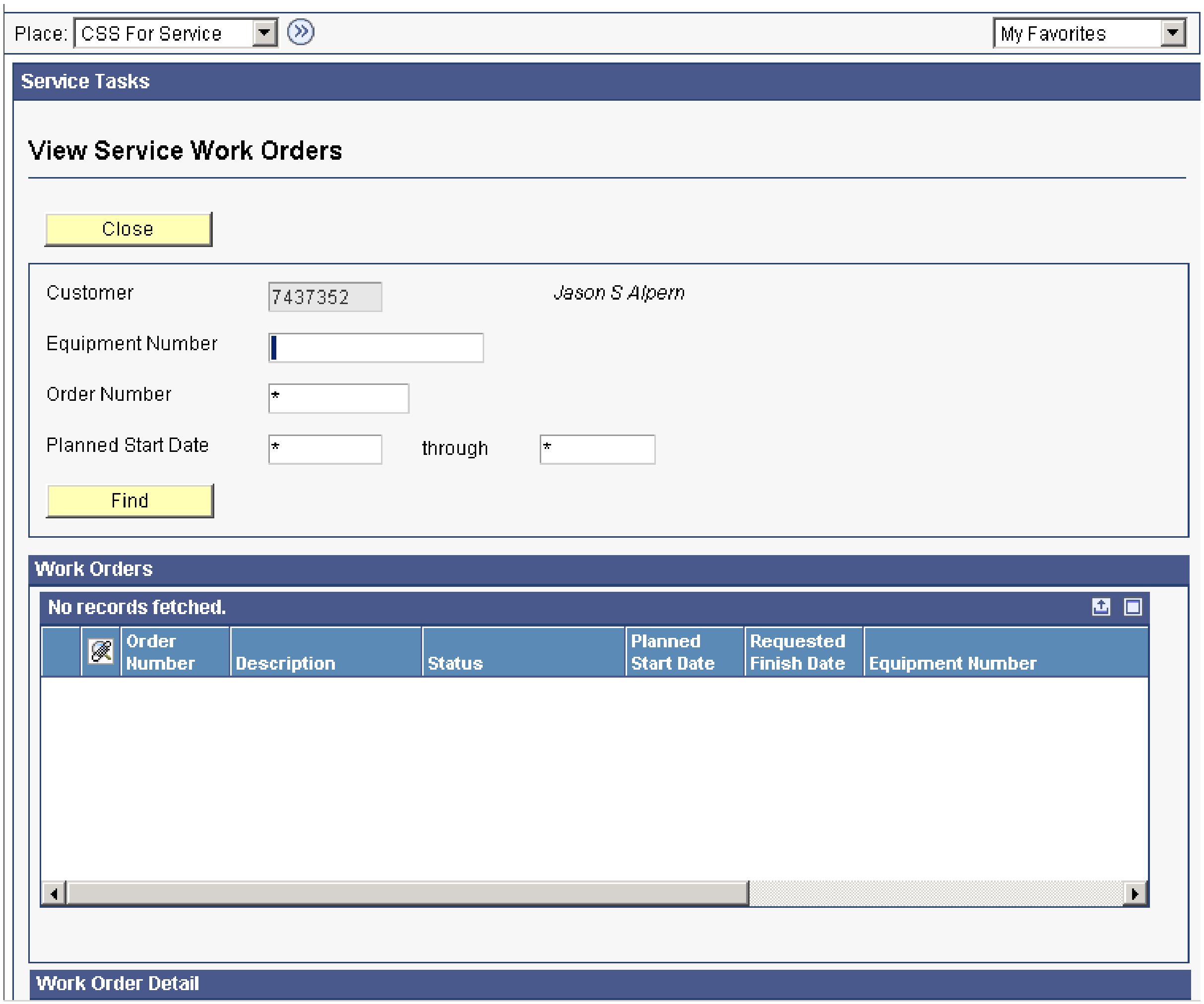
Product Model
Enter the code that classifies an inventory item into a model for customer service.

Status
Enter the user defined code (system ES, type 12) that identifies the equipment's current status, such as available, down, or disposed.

5.5.4 Viewing Work Orders Through the Service Tasks Portlet

Access the View Service Work Orders form.

Figure 5–36 View Service Work Orders form



Equipment Number
Enter the identification code for the equipment asset. You enter the identification code in one of these formats:

1: Asset number (a computer-assigned, 8-digit, numeric control number)

2: Unit number (a 12-character alphanumeric field)

3: Serial number (a 25-character alphanumeric field)

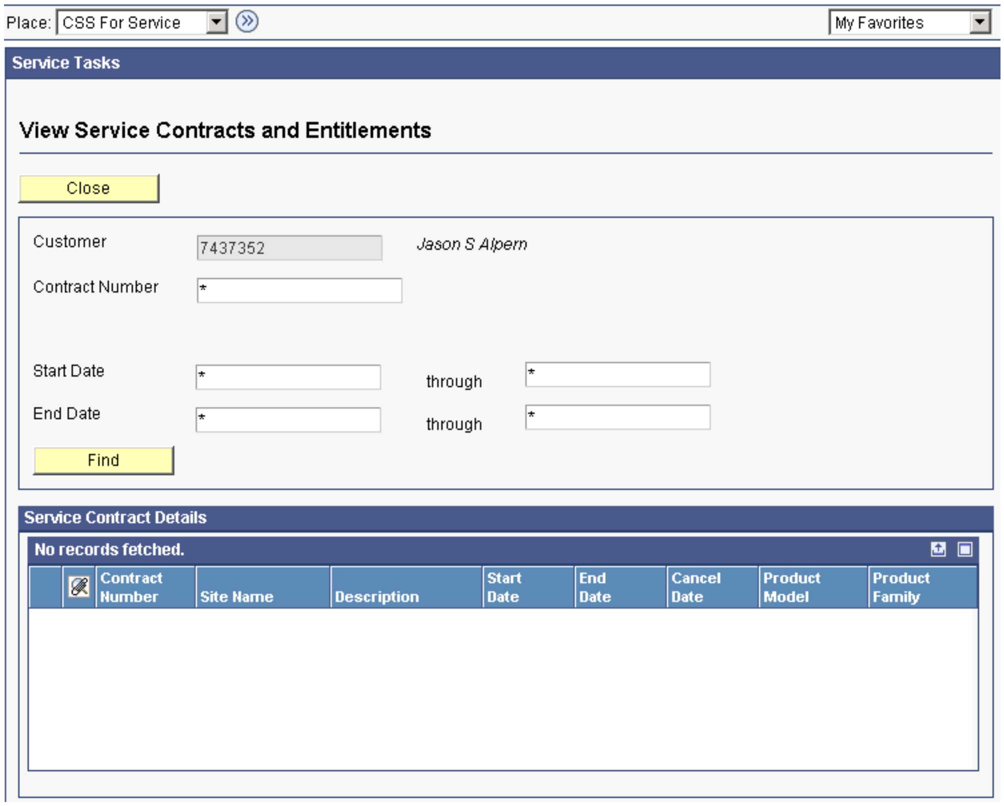
Order Number
Enter the number that identifies the sales order.

Planned Start Date
Enter the tentative starting date for the order. You can enter this date manually, or have the system calculate it using a back scheduling routine. The routine starts with the required date and offsets the total lead time to calculate the appropriate start date.

5.5.5 Viewing Contracts and Entitlements Through the Service Tasks Portlet

Access the Viewing Service Contracts and Entitlements form.

Figure 5–37 View Service Contracts and Entitlements form



Contract Number
Enter the number that identifies the contract.

Start Date
Enter the date on which you actually start work on the contract.

End Date
Enter the date on which you actually complete work on the contract.

5.5.6 Using the Service Search Portlet (P90CA972)

The Service Search portlet provides a default or an advanced search for service related information. The type of search and the subject that is searched will determine if additional information needs to be entered.

Figure 5–38 Service Search Portlet

Selecting the Personalize icon will enable defaults to be selected for the default and advanced search.

The options available for the Default Service Search Type are:

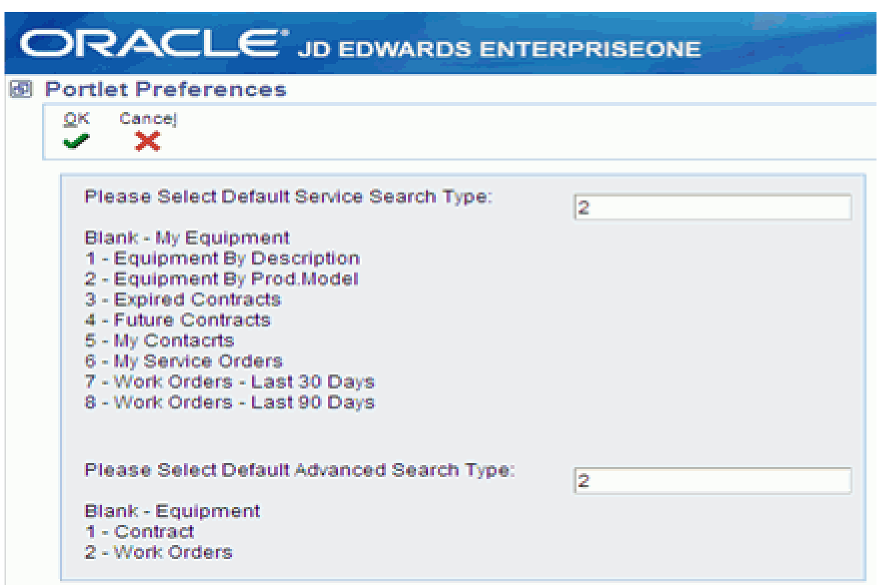
Value	Selection
Blank	My Equipment
1	Equipment By Description
2	Equipment By Prod. Model
3	Expired Contracts
4	Future Contracts
5	My Contracts
6	My Service Orders
7	Work Orders - Last 30 Days
8	Work Orders - Last 60 Days

The options available for the Default Advanced Search Type are:

Value	Selection
Blank	Equipment
1	Contract
2	Work Orders

In this example we will select 2 -Equipment by Prod. Model for the Default Service Search Type and 2 - Work Orders for the Default Advanced Search Type.

Figure 5–39 Service Search Portlet Personalization Preferences



These values will now become the default when the portlet is displayed.

Figure 5–40 Service Search Portlet Example

5.6 Using the CSS for Support Portlets

This section discusses how to:

- View cases through the Support Tasks portlet.
- Add new cases through the Support Tasks portlet.
- Use the Support Search portlet.
- Use the Support Alerts portlet.
- Use the Solution Advisor portlet.

5.6.1 Forms Used by the CSS for Support Portlets

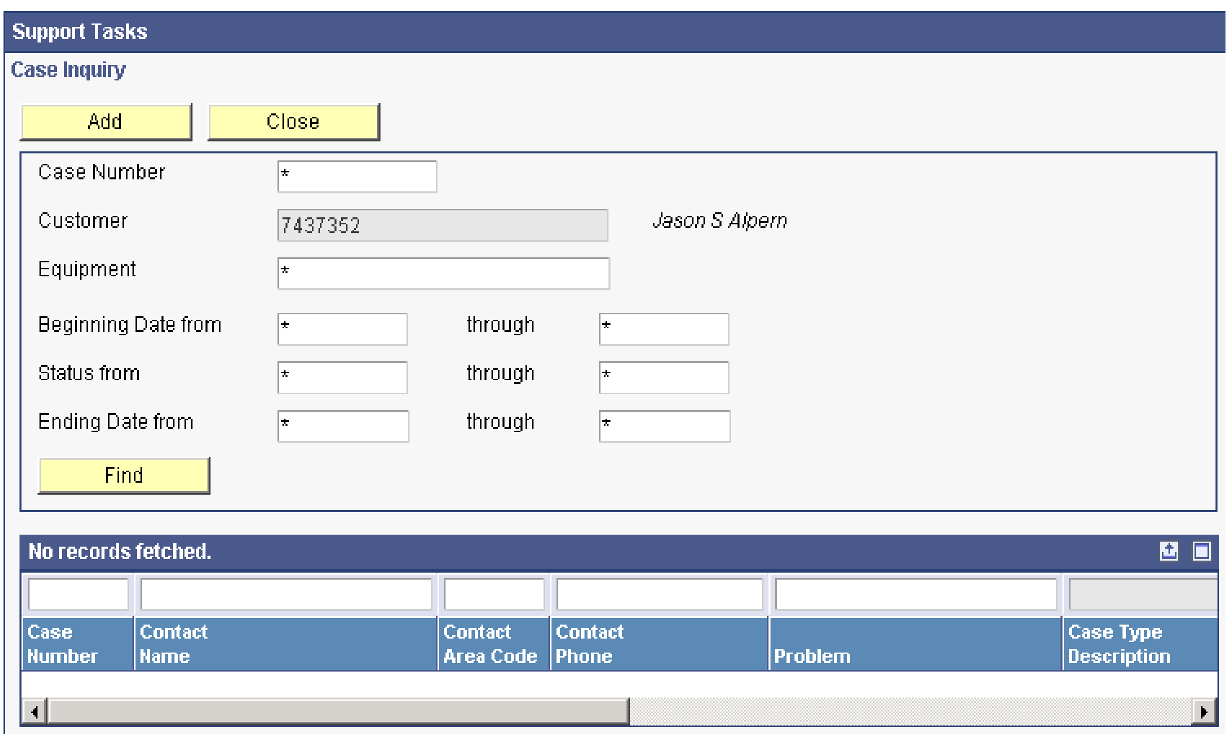
Form Name	FormID	Navigation	Usage
Case Inquiry	W90CG900C	Select CSS for Support from the portal's Place menu. Click View Cases in the Support Tasks window. Alternatively, in the Support Search window's Search For menu, select the search type and click Go.	View existing case information.
Case Entry and Update	W90CG900B	Select CSS for Support from the portal's Place menu. Click Add New Case in the Support Tasks. Alternatively, click Add on the Case Inquiry form.	Add a new case.

Form Name	FormID	Navigation	Usage
Support Search	W90CG900C	Select CSS for Support from the portal's Place menu. In the Support Search window, select one of the contract search options in the Search For menu, and then click Go.	Search for cases.
Support Alerts	W90CG900C	Select CSS for Support from the portal's Place menu. Click the numeral for either Critical Cases or Cases Pending Action in the Support Alerts window.	View alerts for critical cases or cases that are pending action.
Solution Advisor Solution Search	W90CE100C	Select CSS for Support from the portal's Place menu. In the Solution Advisor window, enter a description of the problem and select the search parameters, and then click Find.	Search for solutions in the Solution Advisor.

5.6.2 Viewing Cases Through the Support Tasks Portlet

Access the Case Inquiry form.

Figure 5–41 Case Inquiry form



Case Number
Enter the number that identifies the case.

Equipment
Enter the identification code for the equipment asset. You enter the identification code in one of these formats:

1: Asset number (a computer-assigned, 8-digit, numeric control number)

2: Unit number (a 12-character alphanumeric field)

3: Serial number (a 25-character alphanumeric field)

Beginning Date From
Enter the date on which the case first becomes active.

Through
Enter the last date on which the case becomes active.

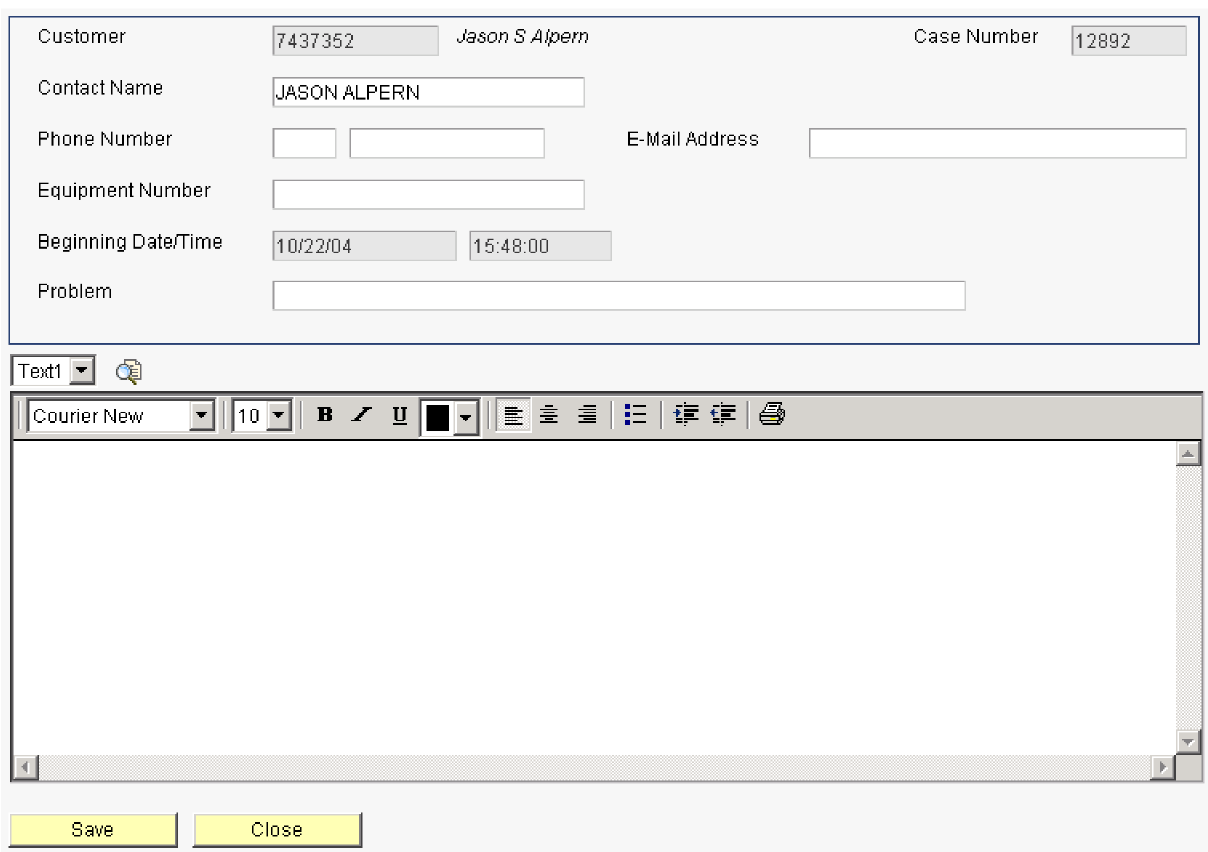
Status From and Through
Enter the code that specifies the status of a case.

Ending Date From and Through
Enter the first date or the last date on which the case was closed.

5.6.3 Adding New Cases Through the Support Tasks Portlet

Access the Case Entry and Update form.

Figure 5–42 Case Entry and Update form



Contact Name
Enter the name of the contact for the case.

Phone Number
Enter the telephone number prefix (such as area code) and the telephone number for the contact.

Email Address
Enter the case contact's email address.

Equipment Number
Enter the identification code for the equipment asset. You enter the identification code in one of these formats:

1: Asset number (a computer-assigned, 8-digit, numeric control number)

2: Unit number (a 12-character alphanumeric field)

3: Serial number (a 25-character alphanumeric field)

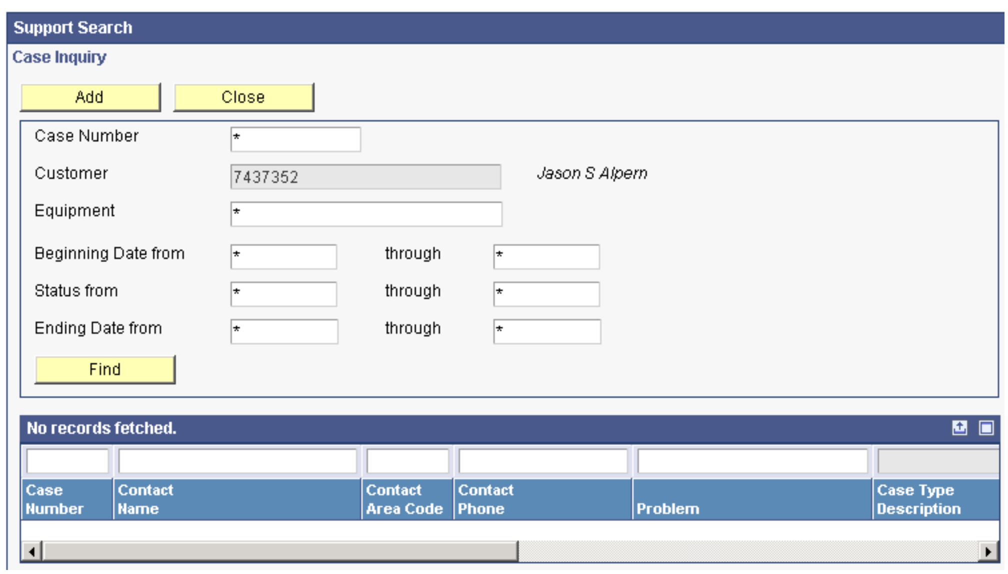
Problem
Enter a brief description of the customer issue.

5.6.4 Using the Support Search Portlet

Access the Support Search form.

1. At the Search For field, select from the menu the type of support-related record for which you want to search.
2. On the search form for the search type you selected, locate the support-related record.

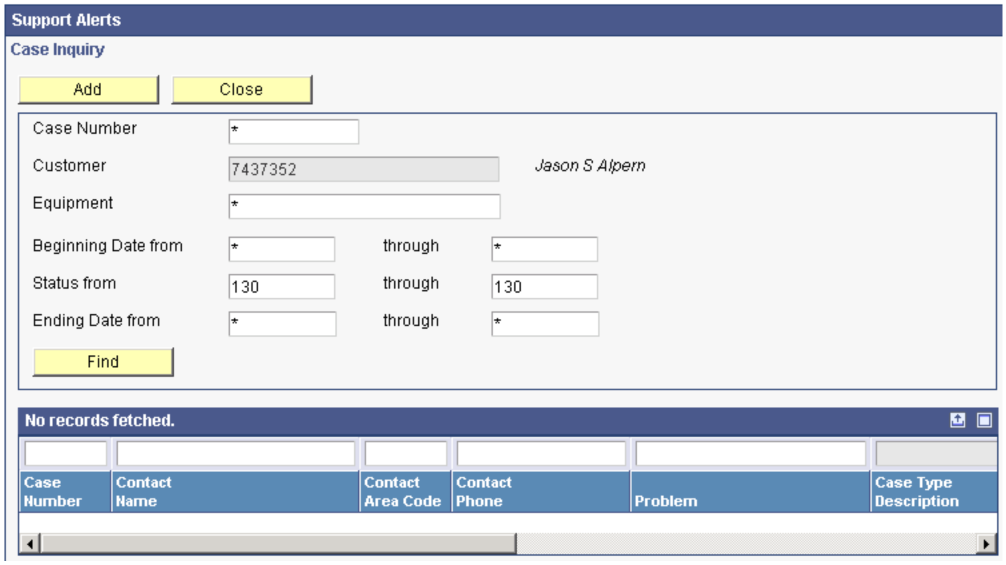
Figure 5–43 Support Search form



5.6.5 Using the Support Alerts Portlet

Access the Support Alerts form to view any critical cases and cases pending action

Figure 5–44 Support Alerts form



5.6.6 Using the Solution Advisor Portlet (P90CA971)

The Solution Advisor portlet provides search capabilities to search for solutions. A Problem Description field is available to enter a brief description of the problem with different options on the level of matching used in the search.

Figure 5–45 Solution Advisor Portlet

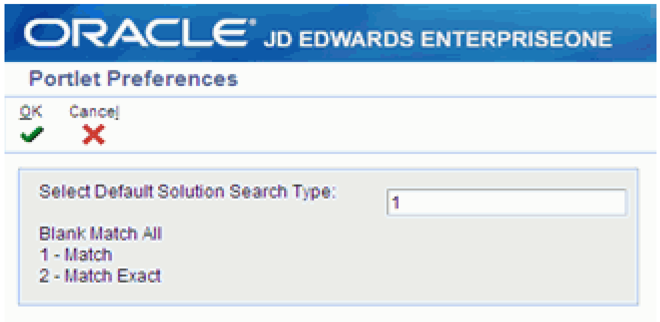
Selecting the Personalize icon will enable defaults to be selected for the Default Solution Search Type for matching.

The options available for the Default Solution Search Type are:

Value	Selection
Blank	Match All
1	Match
2	Match Exact

In this example we will select 1 for Match for the Default Solution Search Type.

Figure 5–46 Solution Advisor Portlet Personalization Preferences



Match will now become the default and will be displayed as Match Any when the portlet is displayed.

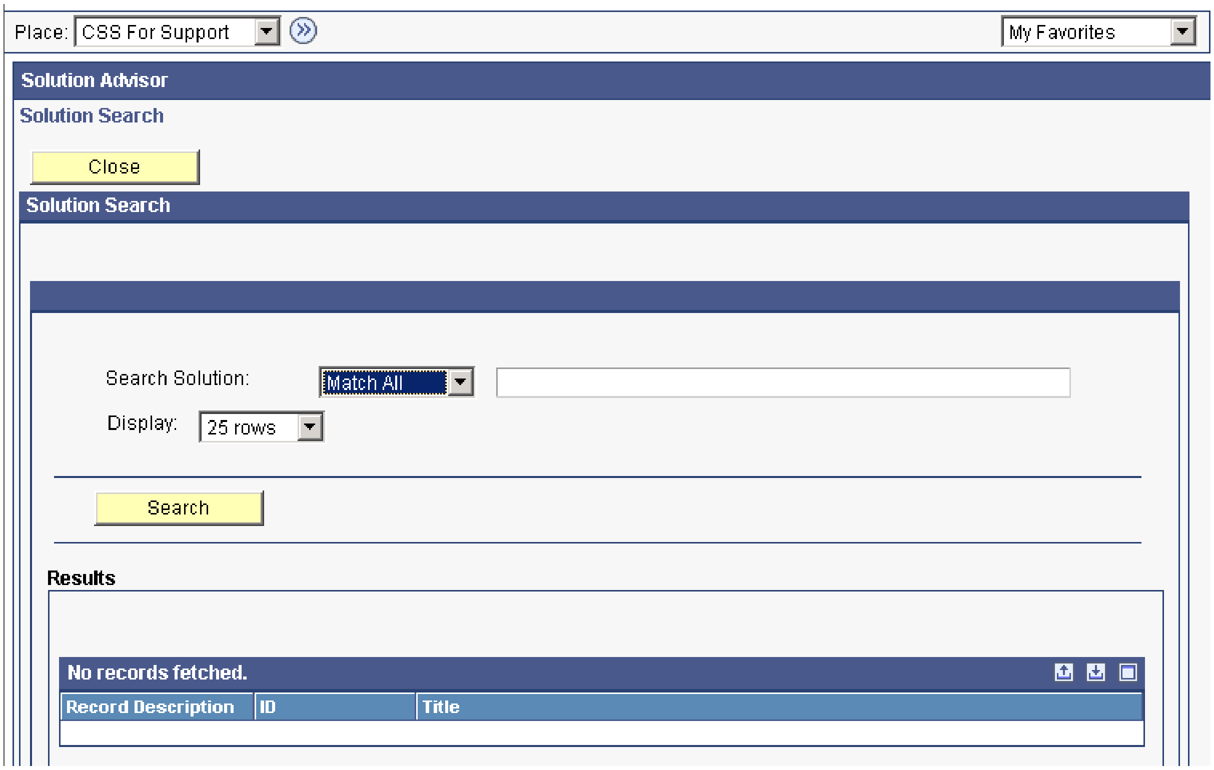
Figure 5–47 Solution Advisor Portlet Example

5.6.7 Using the Solution Advisor Form

Access Solution Advisor window.

1. In the Problem Description field, enter a brief summary of the problem for which you want to find a solution.
2. Specify the search parameters (such as Match All) in the menu.
3. Click Find to search for and display results matching the problem description and search parameters.

Figure 5–48 Solution Advisor Solution Search form



6 Understanding RSS Portlets

This chapter discusses understanding RSS portlets. This section of the guide should be used in conjunction with the *JD Edwards EnterpriseOne Requisition Self-Service Implementation Guide*

6.1 Using JD Edwards EnterpriseOne Requisition Self Service

If your organization has an employee portal, you can create links to programs that your employees might frequently use, such as Shopping Cart (P43E25) and Desktop Receiving (P43E20) on the portal.

See "Entering a Requisition Using the Shopping Cart Program" in the *JD Edwards EnterpriseOne Applications Requisition Self-Service Implementation Guide*.

See "Understanding the Desktop Receiving Program" in the *JD Edwards EnterpriseOne Applications Requisition Self-Service Implementation Guide*.

You can also set up the JD Edwards EnterpriseOne Requisition Self Service portlet (P43E83) for buyers within your organization and attach it to the portal. The Requisition Self Service portlet contains alerts, such as:

- Open approvals.

  See Understanding the Requisition Entry Program in the *JD Edwards EnterpriseOne Applications Requisition Self-Service Implementation Guide*.

- Requisition lines marked as high priority.

  See "Understanding the Requisition Entry Program" in the *JD Edwards EnterpriseOne Applications Requisition Self-Service Implementation Guide*.

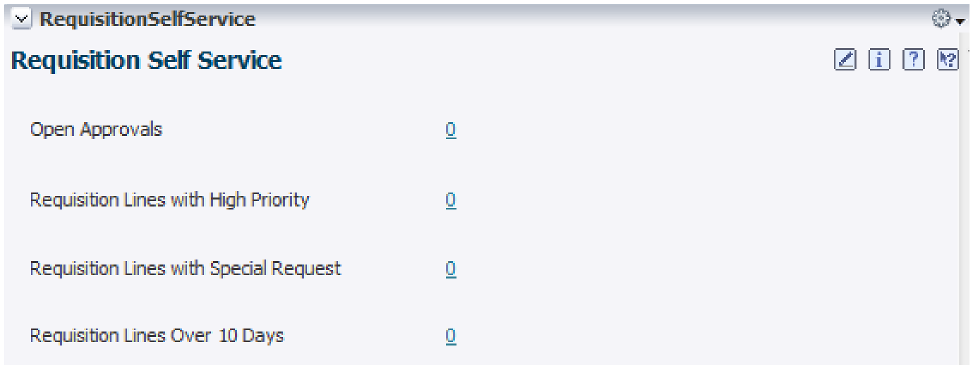
- Requisition lines marked as special requests.

  See "Requisition lines marked as special request" in the *JD Edwards EnterpriseOne Applications Requisition Self-Service Implementation Guide*.

- Requisition lines that have been open for more than 10 days.

  See "Requisition lines that have been open for more than 10 days" in the *JD Edwards EnterpriseOne Applications Requisition Self-Service Implementation Guide*.

Below is an example of the Requisition Self Service portlet:



If you want to modify the JD Edwards EnterpriseOne Requisition Self Service portlet, you must use Form Design Aid to make any modifications. The JD Edwards EnterpriseOne Requisition Self Service portlet conforms to the JSR 168 specification.

See *JD Edwards EnterpriseOne Tools Form Design Aid Guide*.

7 Setting Up Viewable and Configurable Portlets

This chapter contains the following topics:

- Section 7.1, "Understanding Viewable and Configurable Portlet Types"
- Section 7.2, "Initializing Viewable and Configurable Portlets"

7.1 Understanding Viewable and Configurable Portlet Types

In the JD Edwards Collaborative Portal and WebCenter, you can set up viewable and configurable portlets for these types of portlets:

- Isolated URI (IURI)

  This type of portlet is the most flexible because it is not actually integrated into the Portal. IURI portlets allow you full access to the browser frame and to take existing web content and display it in the Portal.

- URI

  This type of portlet always requires interaction between the Portal and a web server. URI portlets can be written as CGI, Java servlets, or HTML pages, and they can reside on a server other than the Portal server. URI portlets tend to be slower than the other portlets.

- HTML

  This type of portlet requires no interaction with an external server, so it provides quick response with very little external resource load. HTML portlets can contain references to applets, ActiveX controls, and images, but the HTML is taken directly from JD Edwards EnterpriseOne database, so the content is static. You can take advantage of pass-through functions, such as RunOWApp and addRunOWAppFI with HTML portlets as well. These functions enable you to launch JD Edwards EnterpriseOne applications.

- Supplier Relationship Management (SRM)

  This portlet provides a fully configurable shell portlet that you can modify without Java programming. You can select the queries to display in the portlet at runtime using a wizard interface.

Viewable portlets can be initialized only to an existing portlet type, but may be initialized by anyone. After initializing a viewable portlet, users cannot modify its definition.

Configurable portlets enable you to initialize a portlet to an existing portlet type or create a new portlet definition. In addition, when you initialize a configurable portlet, you define permissions to determine the type of access users have to the configurable portlet. You can grant either View or View, Config access. View permissions allow users to use a configurable portlet, but prevents them from modifying the definition of the portlet. View, Config permissions allow users to modify the definition and the permissions of a portlet. A user who has View, Config permissions basically has the same permissions of a system administrator. Therefore, you should carefully consider the users to which you grant View, Config permissions.

If a user only has view access to a configurable SRM portlet, the user may still edit the portlet if it contains alert parameters that can be personalized. In this case, the SRM portlet displays an Edit icon that users can select to modify the alert parameters.

7.2 Initializing Viewable and Configurable Portlets

This section discusses how to:

- Initialize viewable HTML, URI, IURI portlets.
- Initialize configurable HTML, URI, IURI portlets.
- Initialize a viewable SRM Portlet.
- Initialize a configurable SRM portlet.

7.2.1 Prerequisites

If you are using the JD Edwards Collaborative Portal, make sure that the WebClient_Portal.war file that contains these portlets has been deployed on the IBM WebSphere Portal.

7.2.2 Initializing Viewable HTML, URI, IURI Portlets

You can initialize viewable HTML, URI, IURI portlets only to an existing portlet type.

Access the portal page that contains the viewable HTML_URI_IURI Component portlet.

1. In the portlet, click the Configure icon.
2. Under Configure Portlet Choice, select an existing portlet from the drop-down list box and then click the Done button.

   The initialized portlet appears on the Portal page.

7.2.3 Initializing Configurable HTML, URI, IURI Portlets

Access the portal page that contains the Configurable_HTML_URI_IURI_Component portlet.

1. In the portlet, click the Configure icon.
2. If you want to use an existing portlet definition, perform these steps:
   a. Select the Select an existing portlet option.
   b. Select an existing portlet from the drop-down list box, and then click the Done button.
3. To create a new portlet definition, select the Create a new portlet of portlet type option, and then select HTML, URI, or IURI from the drop-down list box.
4. Click the Next button and then complete the fields according to the type of portlet selected:

Portlet Type	Fields	Description
HTML	Name	Enter a unique ID for the portlet. The maximum field length is 10 characters. This ID must be unique across the system.
N/A	Title	Enter a name for the portlet. This is the name that appears when the system provides a list of portlets for a user to select from. The maximum field length is 30 characters.
N/A	HTML Code	Enter or edit existing HTML for this component.
URI	Name	Enter a unique ID for the portlet. The maximum field length is 10 characters. This ID must be unique across the system.
N/A	Title	Enter a name for the portlet. This is the name that appears when the system provides a list of portlets for a user to select from. The maximum field length is 30 characters.
N/A	Support Cookies	Indicates whether the component can support cookies.
N/A	Component URL	Enter a URL to existing web content. Select one of the following protocols from the drop-down list box and then enter the remaining path for the URL: ■ http:// ■ https:// Select none if the URL is relative to the context of the portlet.
IURI	Name	Enter a unique ID for the portlet. The maximum field length is 10 characters. This ID must be unique across the system.
N/A	Title	Enter a name for the portlet. This is the name that appears when the system provides a list of portlets for a user to select from. The maximum field length is 30 characters.
N/A	Width	Select the percent or pixels option, and then enter the appropriate value to determine the width of the component IFRAME.
N/A	Height	Indicates the height in pixels of the component IFRAME.
N/A	Scrolling	Select Yes to always display scrollbars in the IFRAME. Select No to never display scrollbars. Select Auto to allow the IFRAME to display scrollbars if they are needed.
N/A	Component URL	Enter a URL to existing web content. Select one of the following protocols from the drop-down list box and then enter the remaining path for the URL: ■ http:// ■ https:// Select none if the URL is relative to the context of the portlet.

5. Click the Next button.

6. In the Add Permissions region, select the type of permission that you want to assign from the Permissions drop-down list box.
   - View

     Select this option to grant only view access to the portlet.
   - View, Config

     Select this option to grant users the capability to re-configure the portlet definition and permissions.
7. In the Who group box, select the option according to the users to which you want to assign permissions and complete the fields accordingly:
   - User
   - Role
   - *PUBLIC
8. Select the Update button to add the permissions record.

   The record appears in the Edit/Remove Permissions region.
9. In the Edit/Remove Permissions region, you can modify or remove permissions.
10. Select the Done button to complete the portlet initialization.

7.2.4 Initializing a Viewable SRM Portlet

You can initialize viewable SRM portlets only to an existing portlet.

Access the portal page that contains the viewable SRMComponent portlet.

1. In the portlet, click the Configure icon.
2. Under Supplier Relationship Management Portlet Choice, select an existing portlet from the drop-down list box.

   The initialized portlet appears on the portal page.

   An initialized viewable SRM portlet may contain an edit icon if the portlet contains an alert that a user can personalize.

7.2.5 Initializing a Configurable SRM Portlet

Access the Portal page that contains the Configurable_ SRMComponent portlet.

1. In the Configurable_SRMComponent portlet, click the Configure icon.
2. If you want to use an existing portlet definition, perform these steps:
   a. Select the Select an existing portlet option.
   b. Select a portlet from the drop-down list box, and then click the Done button.
3. To create a new SRM portlet definition, select the Create a new portlet option, and then click the Next button.
4. For a new portlet definition, perform the necessary steps to select and configure the SRM alerts.

   See "Configuring the SRM Portlet Using the Configuration Wizard" in the *JD Edwards EnterpriseOne Supplier Relationship Management Collaboration Implementation Guide*.

After you select the SRM alerts and configure the alert parameters, the portal displays the page that you use to define permissions for the portlet.

5. In the Add Permissions region, select the type of permission that you want to assign from the Permissions drop-down list box.

   - View

     Select this option to only allow users to view the portlet.

   - View, Config

     Select this option to grant users the capability to re-configure the portlet definition and permissions.

6. In the Who group box, select the option according to the users to which you want to assign permissions and complete the fields accordingly:

   - User
   - Role
   - *PUBLIC

7. Click the Update button to add permissions.

   The record appears in the Edit/Remove Permissions region.

8. In the Edit/Remove Permissions region, you can modify permissions or remove permissions.

9. Click the Done button to complete the portlet initialization.

8

Building Portal Pages for WebCenter

This chapter contains the following topics:

- Section 8.1, "Overview"
- Section 8.2, "Creating a Space"
- Section 8.3, "Creating a Buyer Self-Service Portal Page"
- Section 8.4, "Creating a Customer Self-Service Portal Page"
- Section 8.5, "Creating an Employee Self-Service Portal Page"
- Section 8.6, "Creating a Supplier Self-Service Portal Page"
- Section 8.7, "Creating a My Workspace Portal Page"

8.1 Overview

WebCenter Spaces portals provide two arenas for the presentation of resources and information: a Space and the Home Space.

Spaces are typically used to create portals and communities that are scoped to a specific audience, for example, a specific division, department, project, or community.

The Home Space provides each user with a private work area for storing personal content, viewing and responding to business process assignments, maintaining a list of online buddies, and performing many other tasks relevant to his or her unique working day.

The WebCenter administrator will determine which users will be able to create Spaces based on the role and permissions assigned to each user.

8.2 Creating a Space

Login into WebCenter Spaces using the user name and password provided to you. If you do not have user name and password, register yourself.

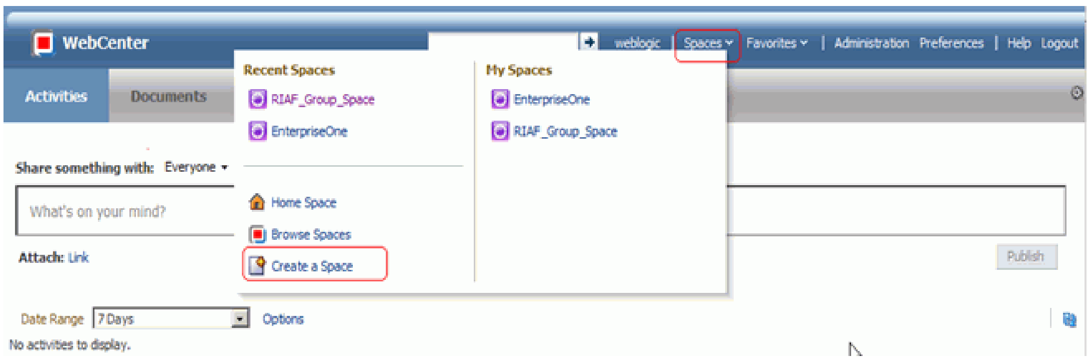
The user name for the portal you are using must match the user name for the EnterpriseOne environment that the portlets are running on.

E.g. If the user name and password for PY900 is AB1234, then the portal user name and password for the WebCenter/Collaborative Portal running PY900 portlets must be AB1234.

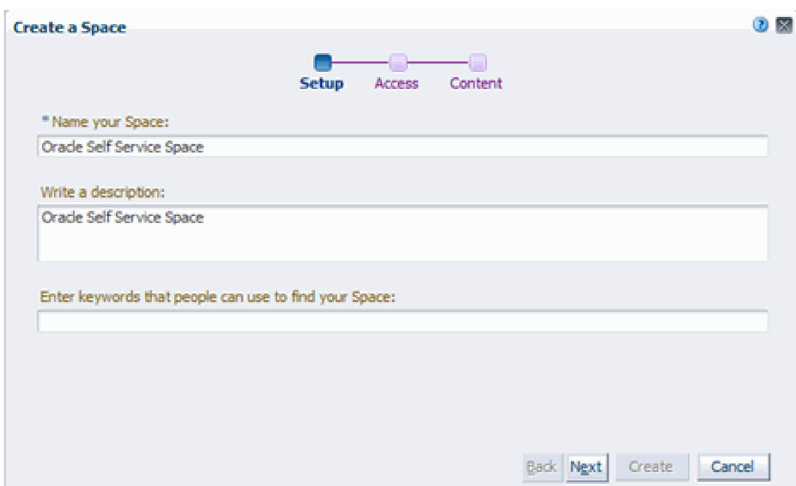
Note: If WebCenter user name is not a valid E1 user name:

- Map WebCenter user name to E1 user name.
- Launch P0092 | W0092P from Fast Path.
- Click Add.
- Enter E1 user in EnterpriseOne UserID field, WebCenter user in Enterprise UserID field. Username must be entered in upper case even though the actual WebCenter user name has lower case characters.

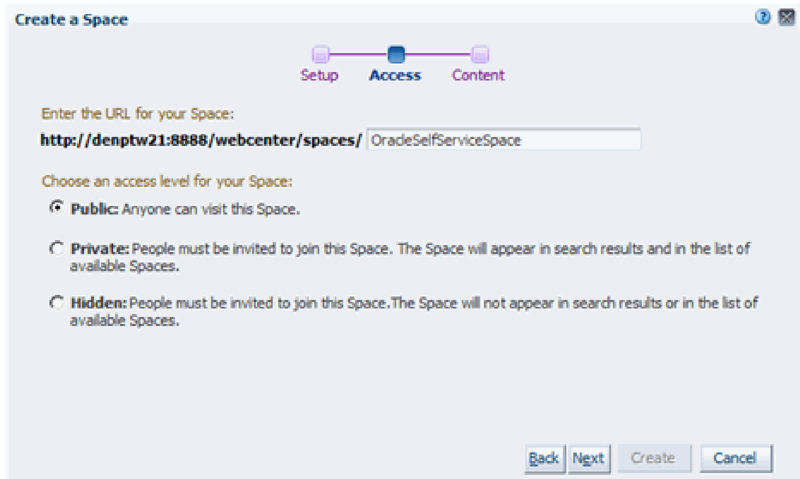
These are the steps to create a Space:



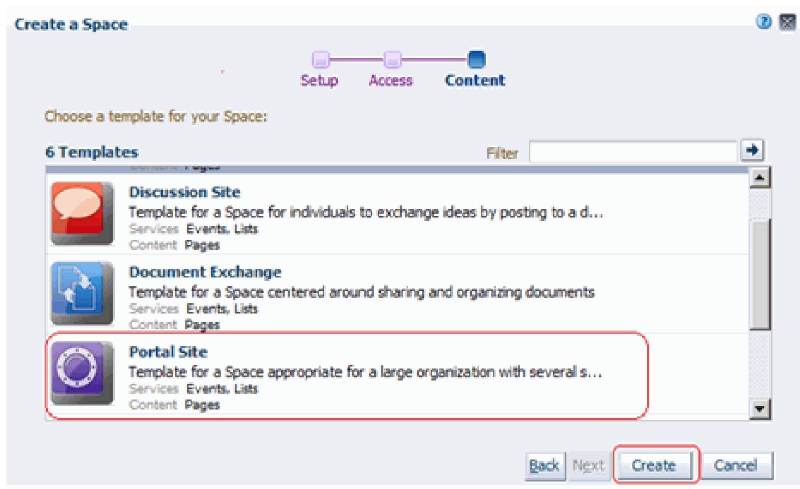
1. Once you login to the WebCenter, click on the *Spaces* link which will display a menu of actions that can be performed on Spaces. Click on the *Create a Space* menu item.



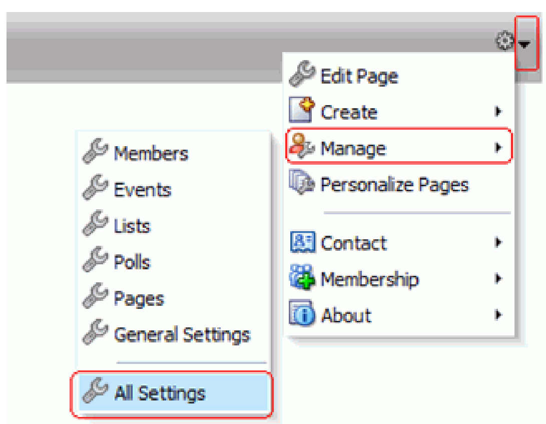
2. Enter the name of your Space and click *Next*.



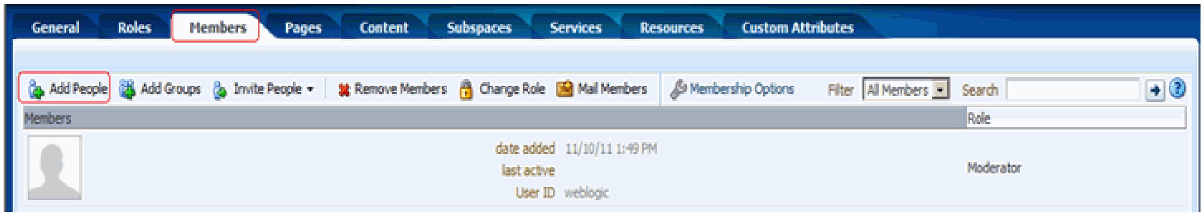
3. Select the level of access; either Public, Private, or Hidden, then click *Next*.



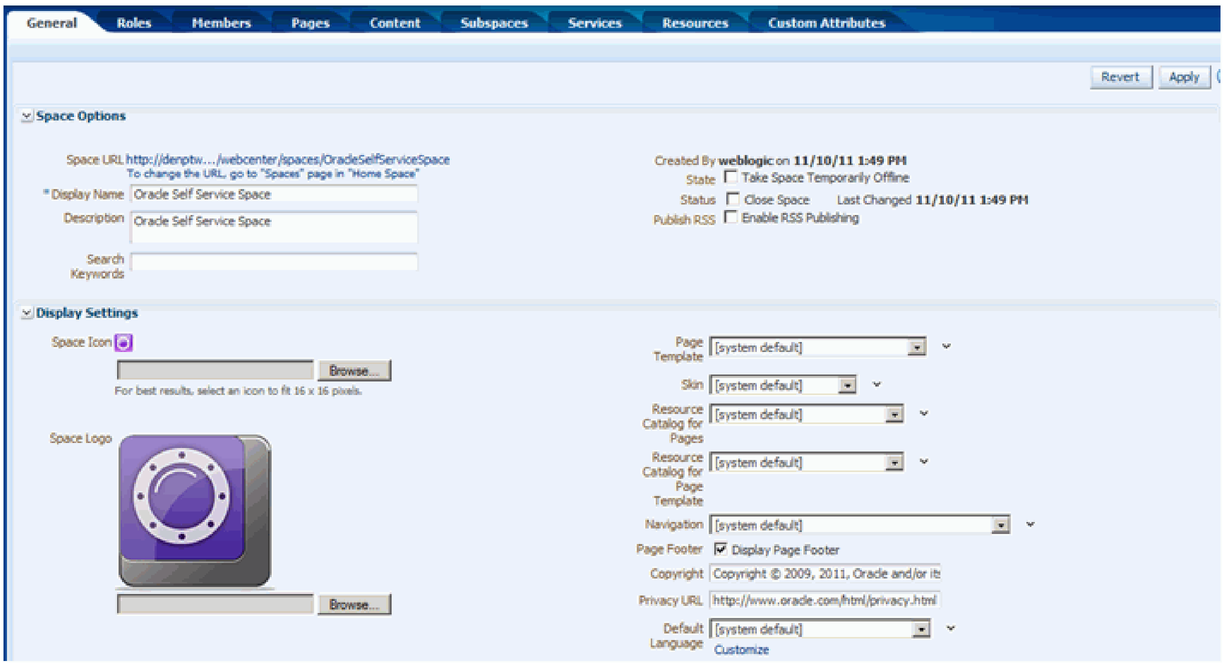
4. Select the type of template to be used. In this example, select the Portal Site template and click the *Create* button.



5. After the Space is created, click on the arrow to the right of the screen to access the drop down menu. Click *Manage*, and then click *All Settings*.



6. Click the *Members* tab. If people need to be added, click the *Add People* tab. For now, we will not be adding any members to the Space.

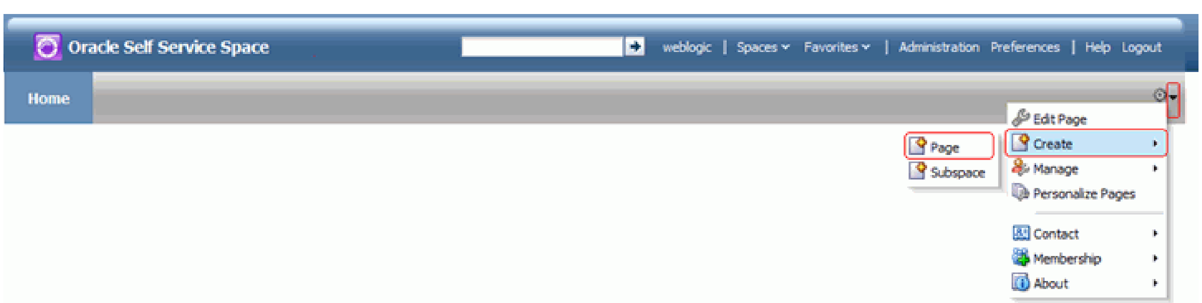


7. Select the General tab.

   Fill the following details:

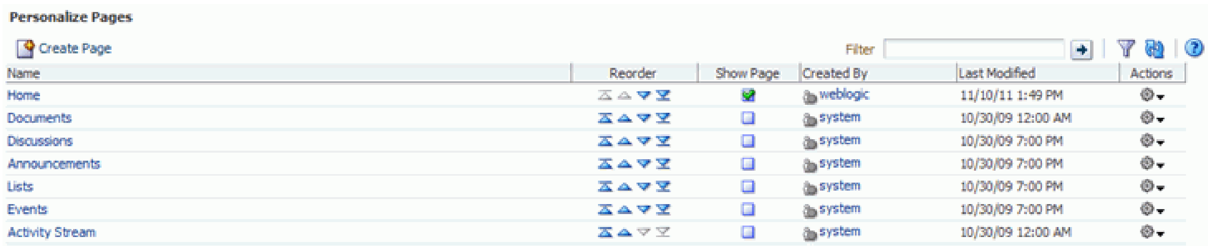
   - Display Name: Oracle Self Service Space
   - Description: Oracle Self Service Space

8. To add a logo to the work space, browse to the location of the logo.
9. Select the logo file and click *Open*.



10. Configure the other details. Set the Default Language and Site Template to Maximized, so that the Space will display the page with the logo we have chosen and will not have the default page settings. Set Copyright to add any copyrights to the page.

By default, Home and Settings pages will be available. Go back to the Home page. The following image shows the Home page. The Home page will have the instructions to Edit and Create pages as well as instructions to enable and disable services for this space. Select the down arrow, click Create, and then click Page.



11. The portal pages can be made available or unavailable by enabling/disabling the display of portal pages on the spaces.

    To disable the display of the Home portal pages:

    1. Click on the down arrow on the right of the screen and click *Manage*, and then click *Pages*, which will display the list of Portal pages on the current Spaces.
    2. To disable a portal page, uncheck the *Show* page property for the corresponding portal page.

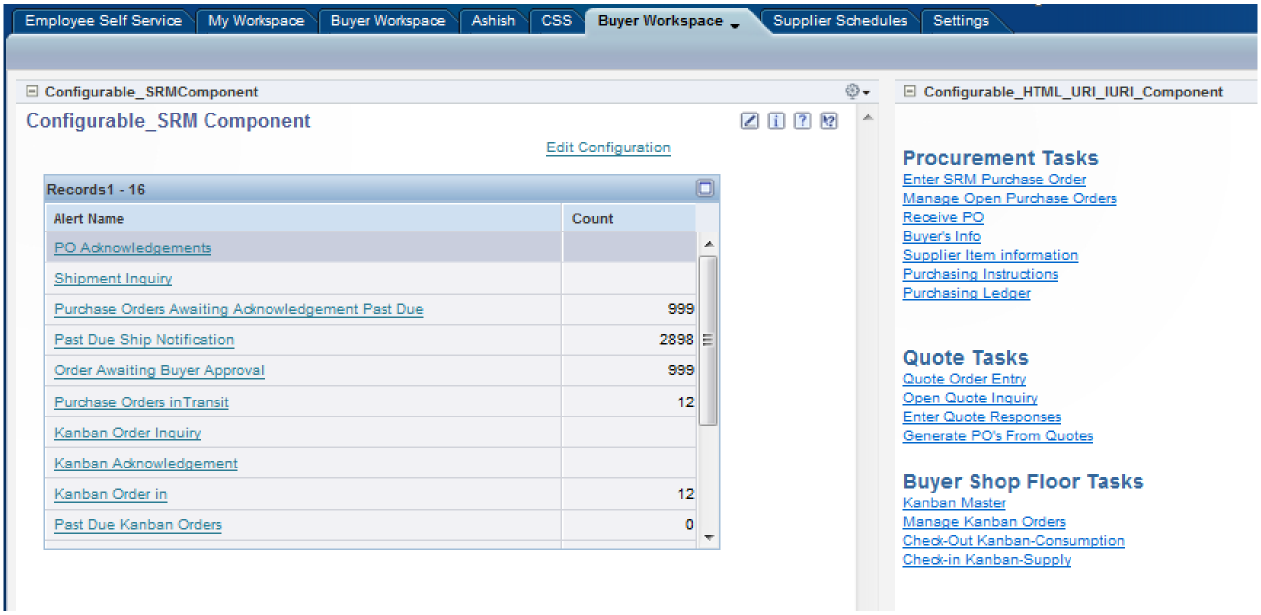
    In this case, the Search and Activity Stream pages are unchecked:

8.3 Creating a Buyer Self-Service Portal Page

WebCenter Spaces also provide a variety of page layouts (called styles) that can used to create different types of pages with different layouts. Page types may restrict the type of content that can be added to a page, such as text only, wiki only, blog only, and the like. Page layouts define the number of columns and content areas that define a page's geometry. Layouts are initially determined by the style that is selected while creating the page. Some page styles inherently allow switching to another page layout, such as wikis or blogs.

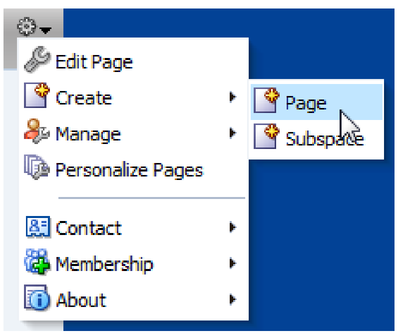
In addition to the layouts available through page styles, the user can create their own layouts using the layout components available through the Resource Catalog.

In this section, we are going to build a Buyer Workspace page, as shown in this image:

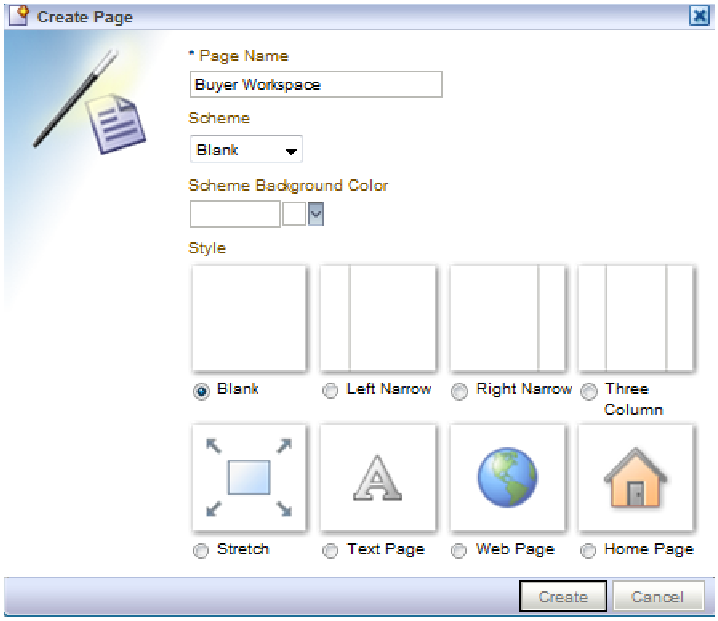


Follow these steps to create the Buyer Workspace page:

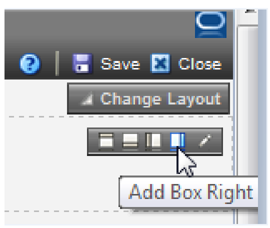
1. Log into WebCenter and access the Oracle Self Service Space the was created in the previous section.



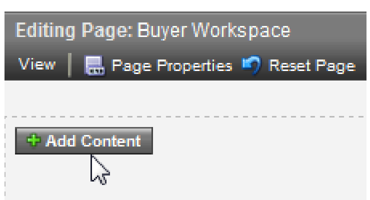
2. Click the Page Actions dropdown arrow, select Create, and then Page.



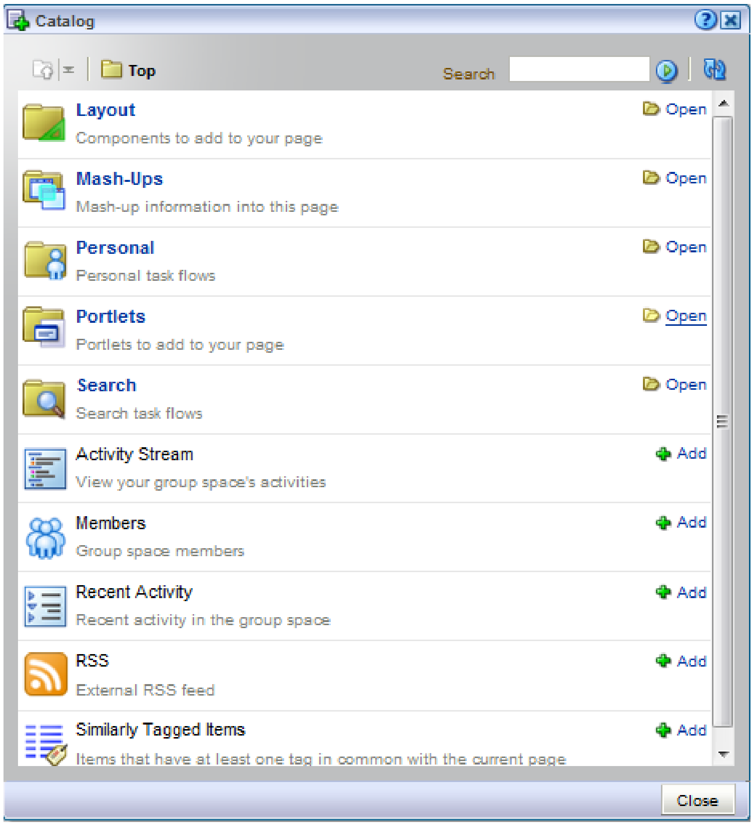
3. Enter the Page Name as "Buyer Workspace" and let the Scheme be Blank and click Create button. This will show Buyer Workspace page in Edit mode having only one column.



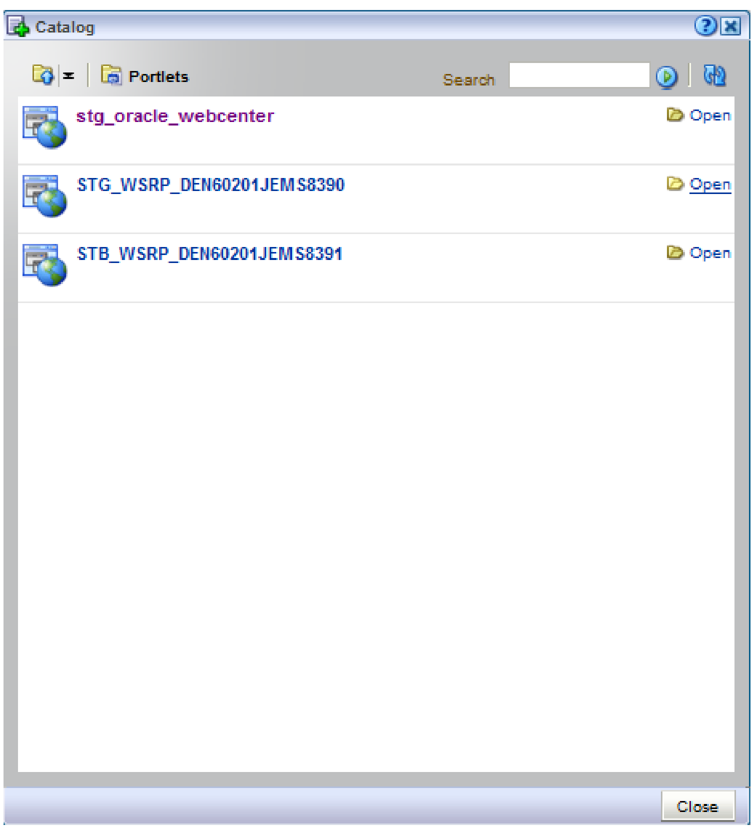
4. Click on Add Box Right.



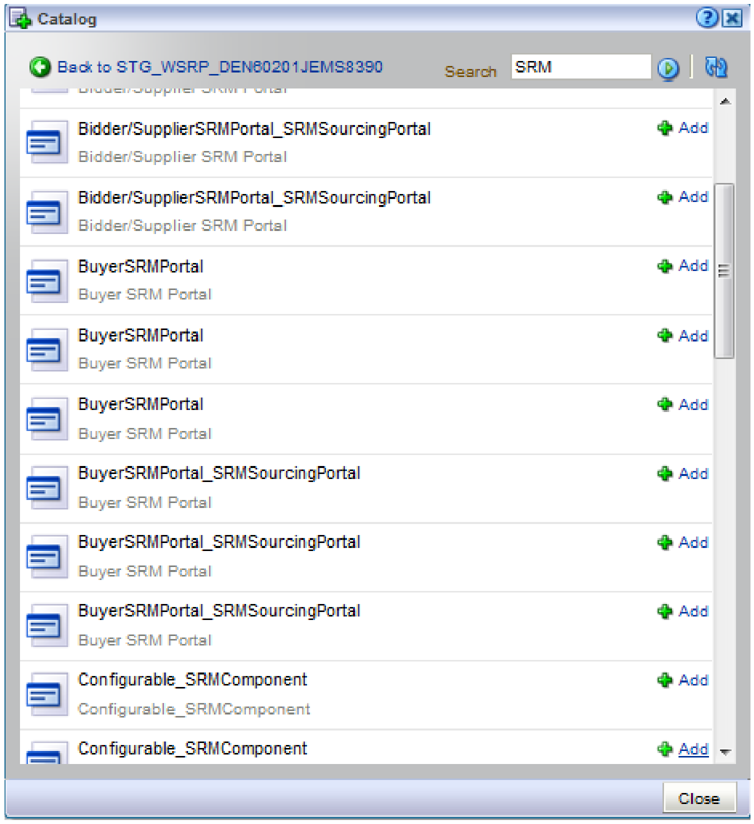
5. Click Add Content to add E1 portlets.



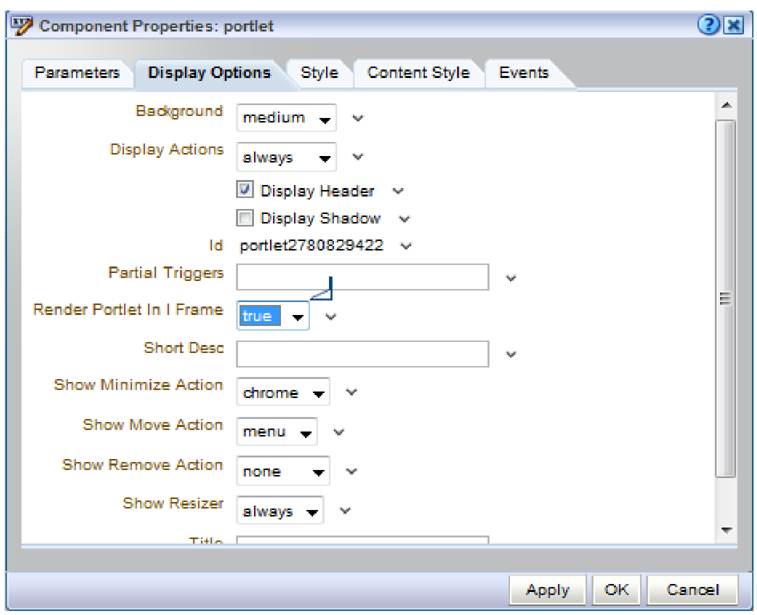
6. Click on *Portlets* to open the Portlets catalog.



7. Select *stg_oracle_webcenter* (this name could be different based on the setup) to see the list of EnterpriseOne portlets available.

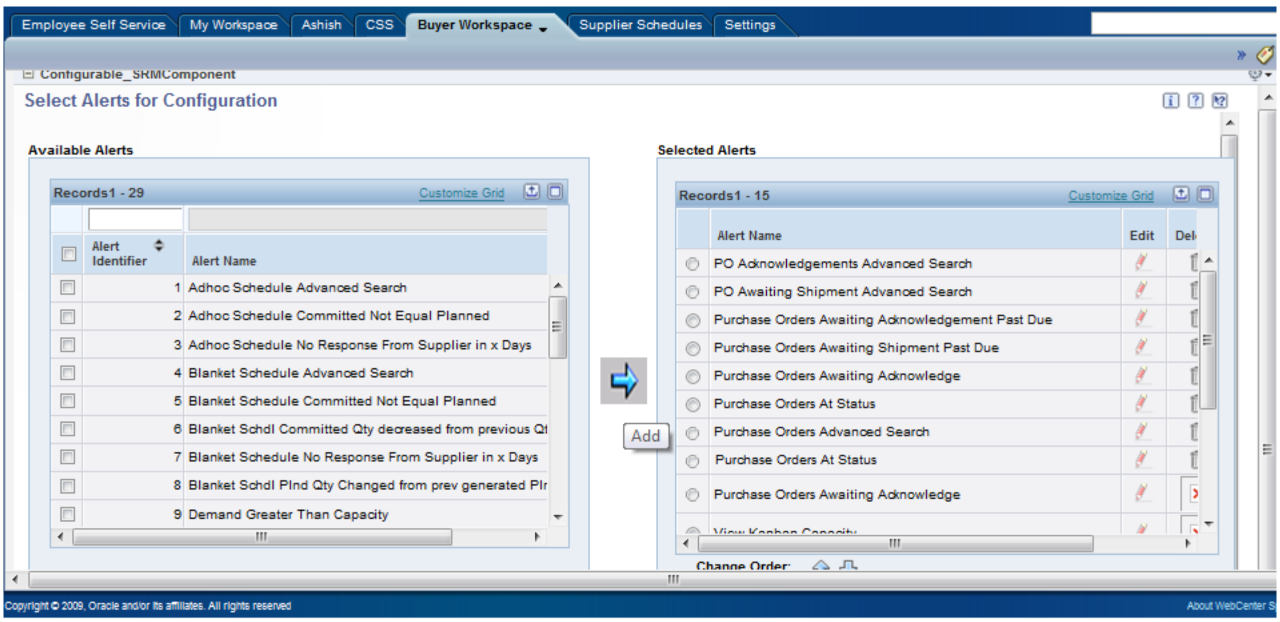


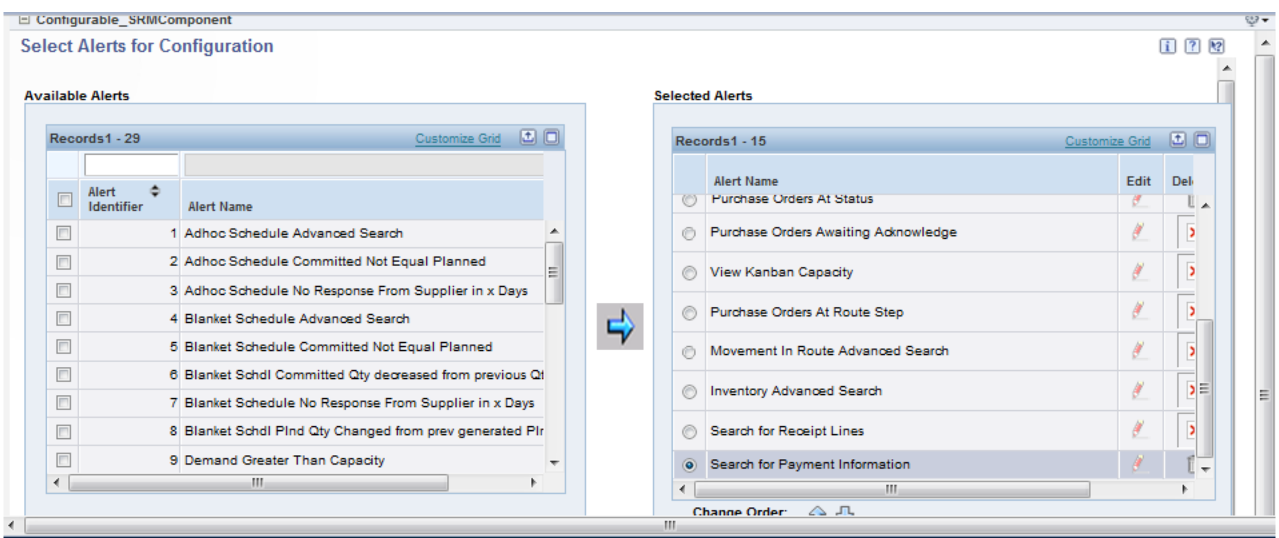
8. Add the Configurable_SRM Component portlet from the list of portlets available, and then click the Close button.



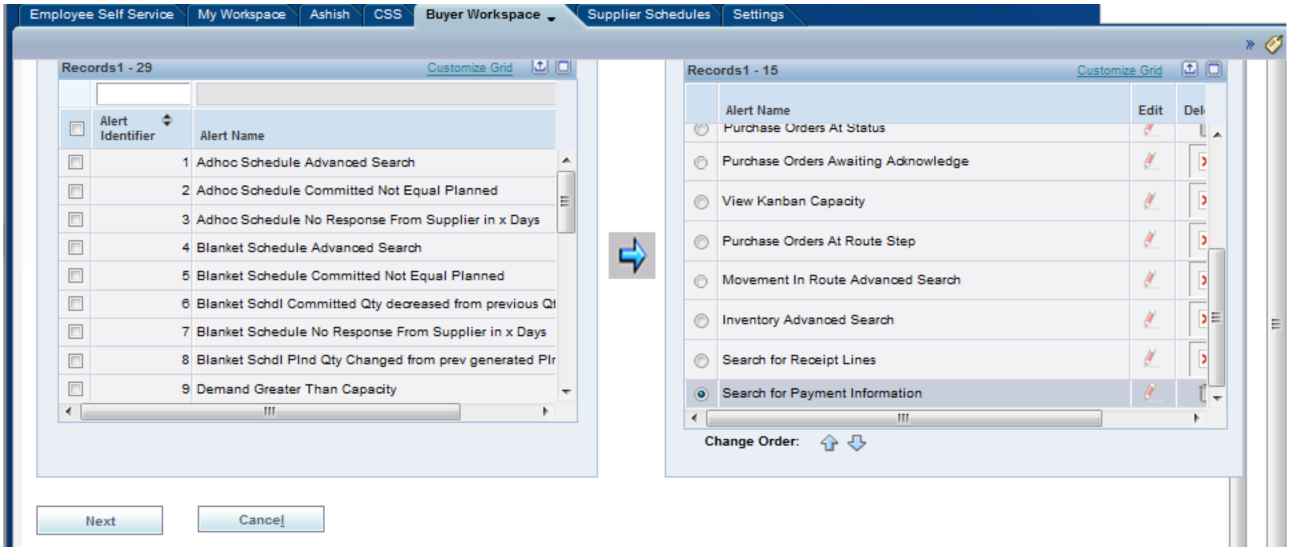
9. Click on the edit button of the portlet and select the *Display Options* tab. Set the property *Render Portlet in I Frame* to true. Click the *OK* button.

10. Save and close the page. Click on the E*dit Configuration* link.





11. Click the Add arrow to add the selected alerts from the Available Alerts grid to the Selected Alerts grid.



12. Click *Next*. This will allow the user to override all of the alert names as desired.

    The images below list all of the alert name overrides.

Figure 8–1 PO Acknowledgements Alert

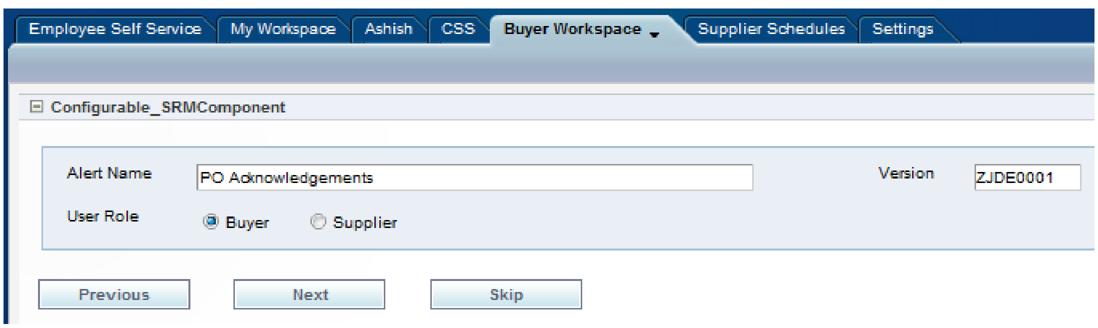


Figure 8–2 Shipment Inquiry Alert

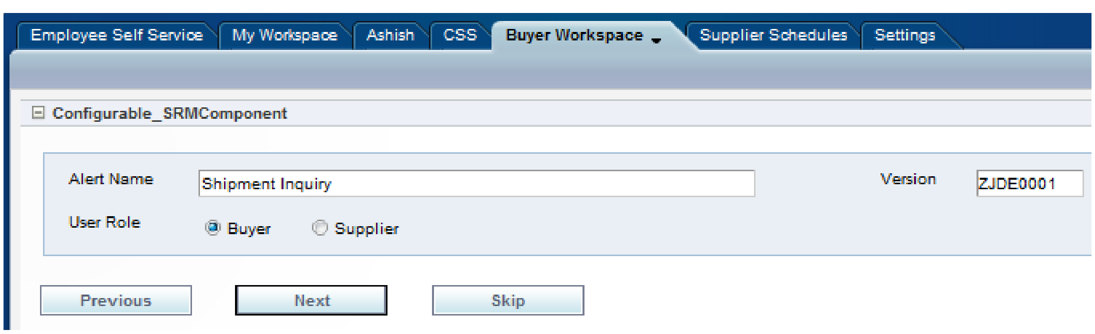


Figure 8–3 Purchase Orders Awaiting Acknowledgement Past Due Alert

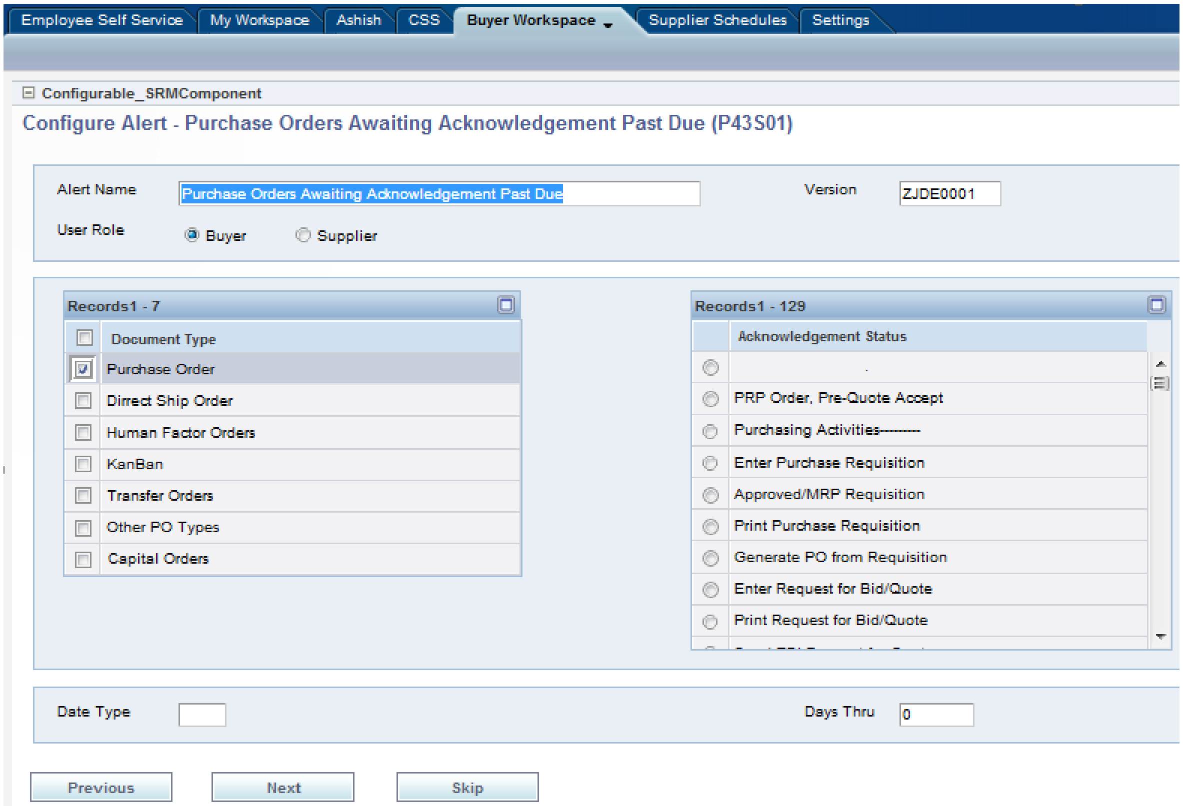


Figure 8–4 Purchase Orders Awaiting Shipment Past Due Alert

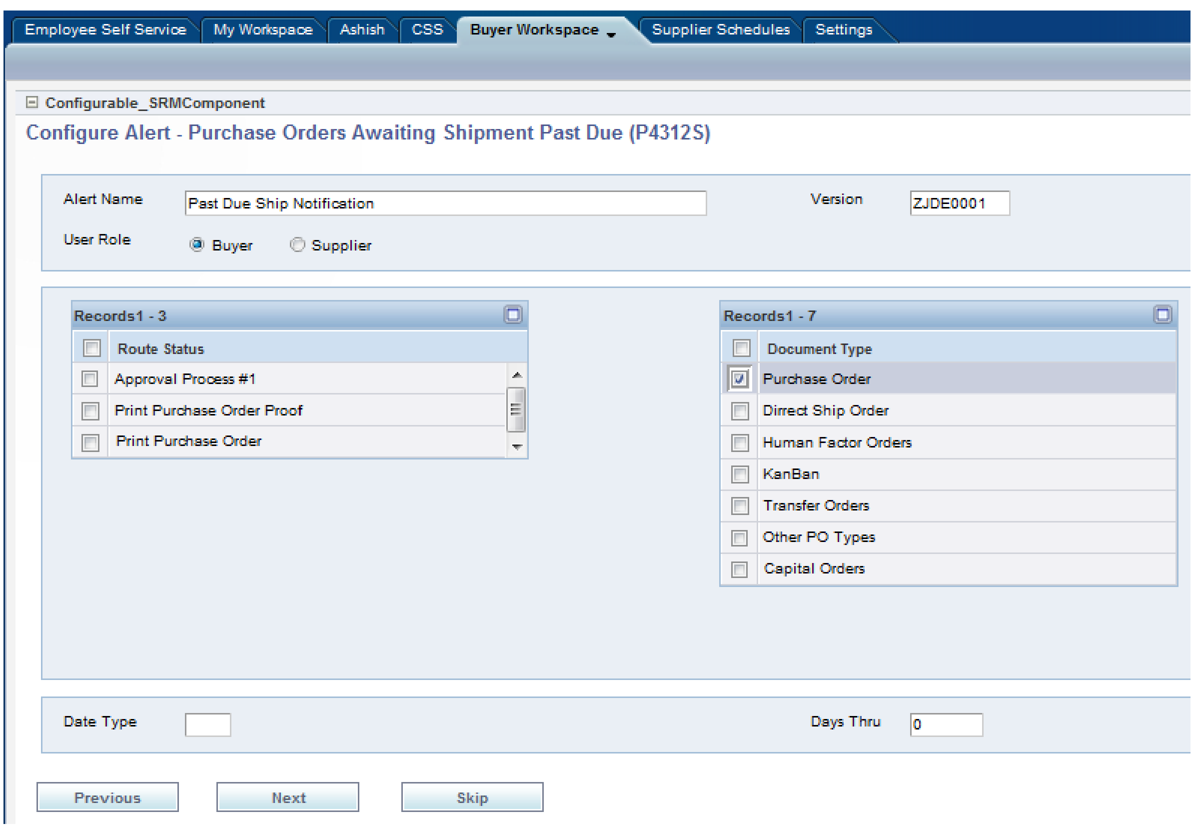


Figure 8–5 Purchase Orders in Status Alert

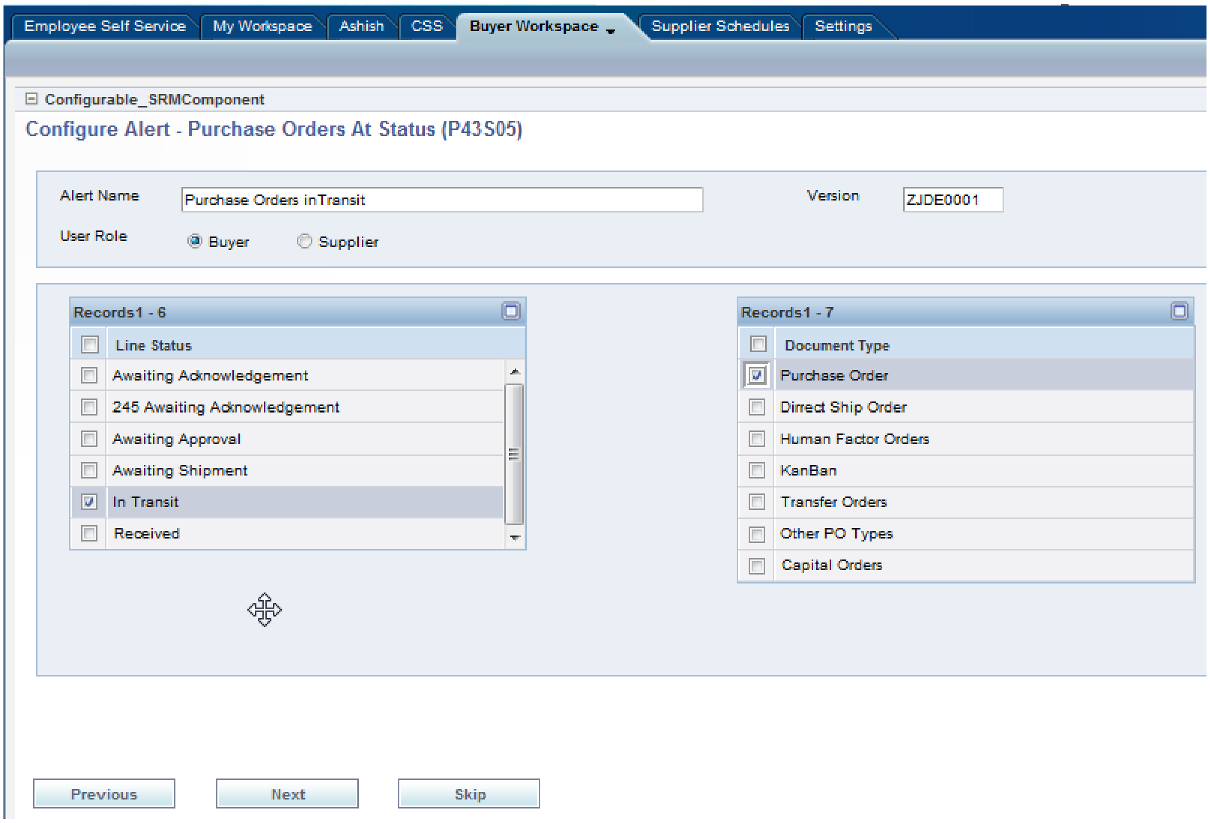


Figure 8–6 Kanban Order Inquiry Alert

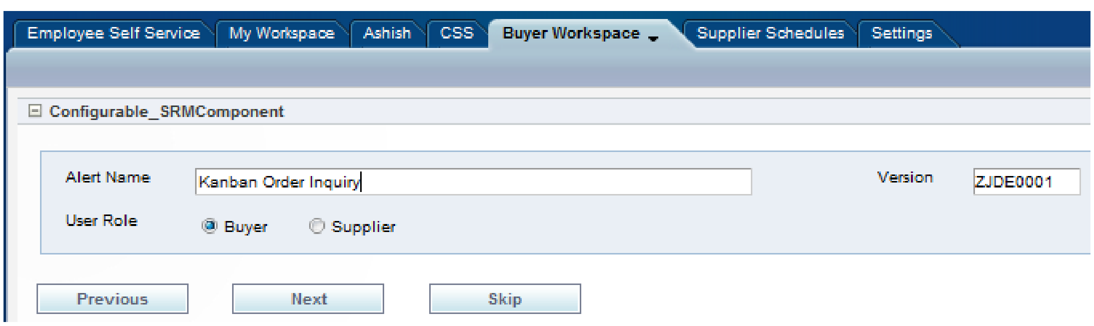


Figure 8–7 Past Due Kanban Orders Alert

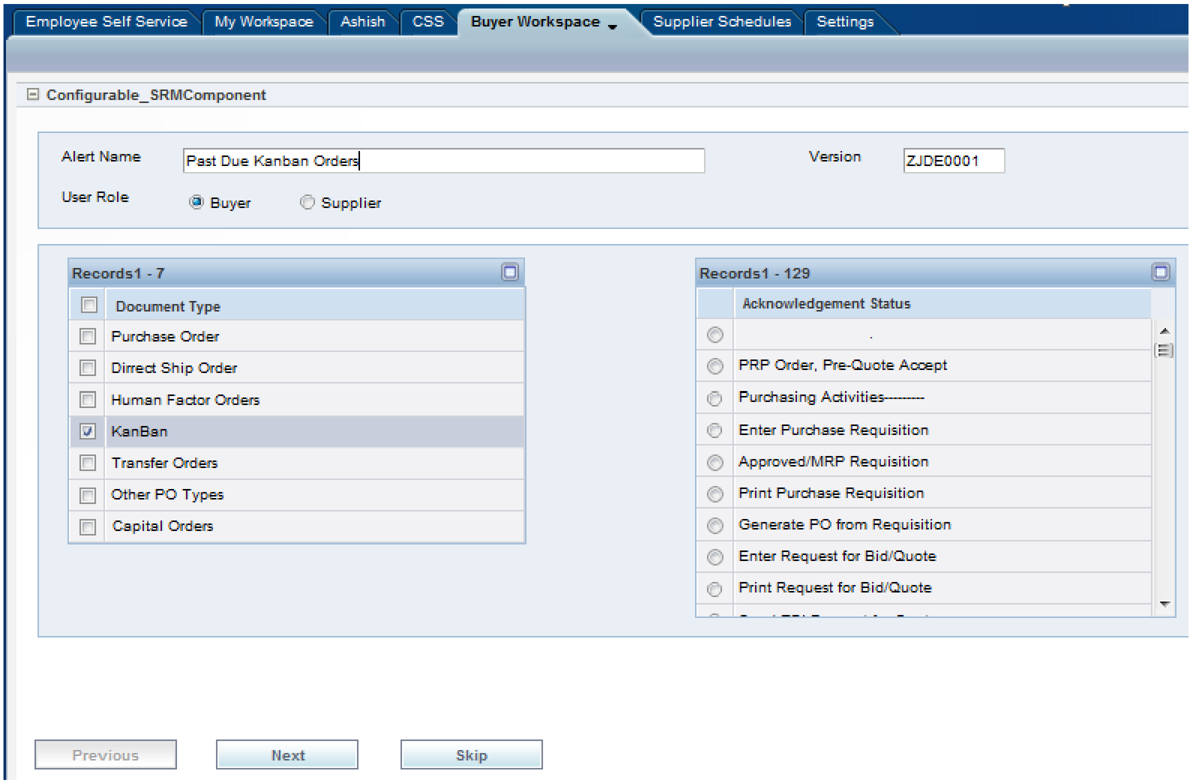


Figure 8–8 View Kanban Capacity Alert

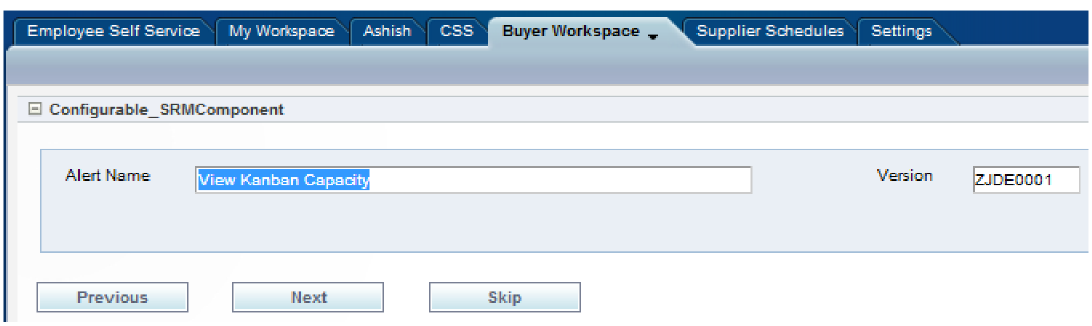


Figure 8–9 Purchase Orders At Route Step Alert

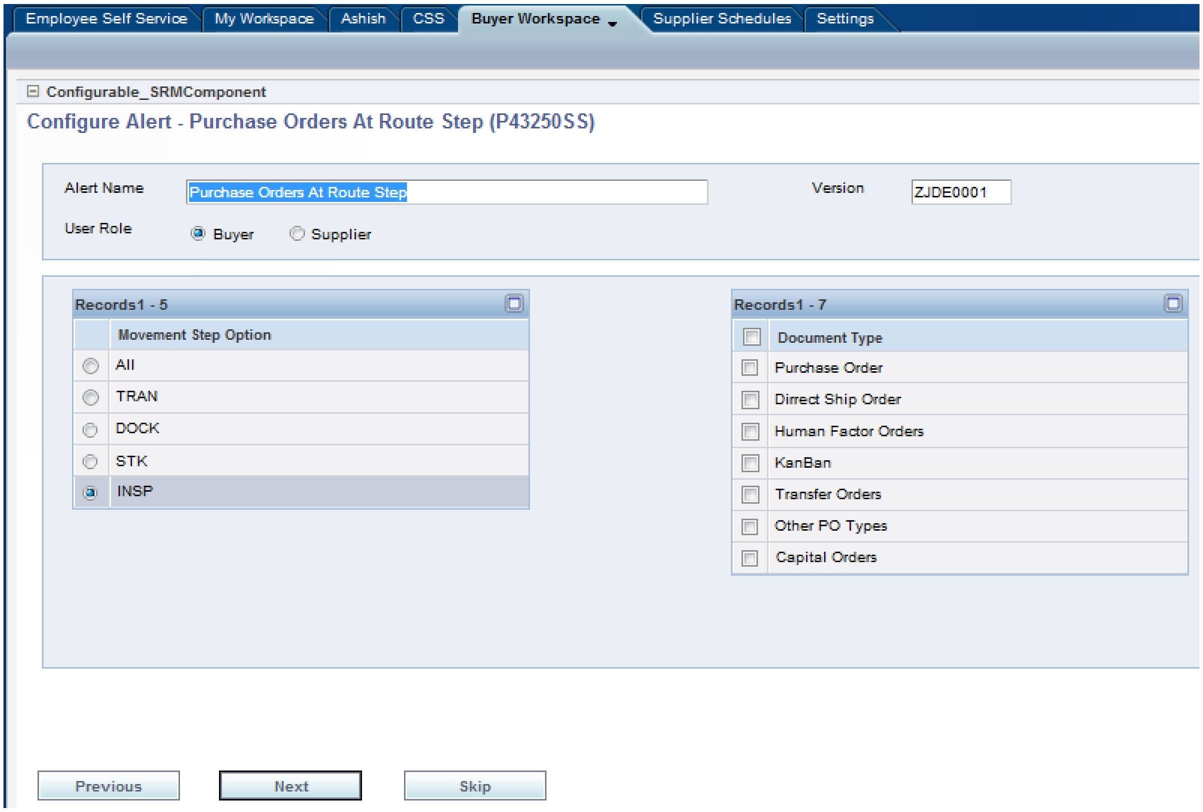


Figure 8–10 Inventory Advanced Search Alert

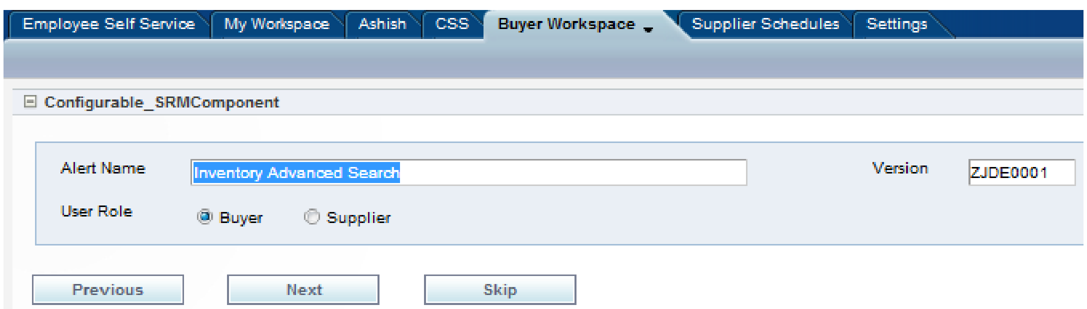


Figure 8–11 Search for Receipt Lines Alert

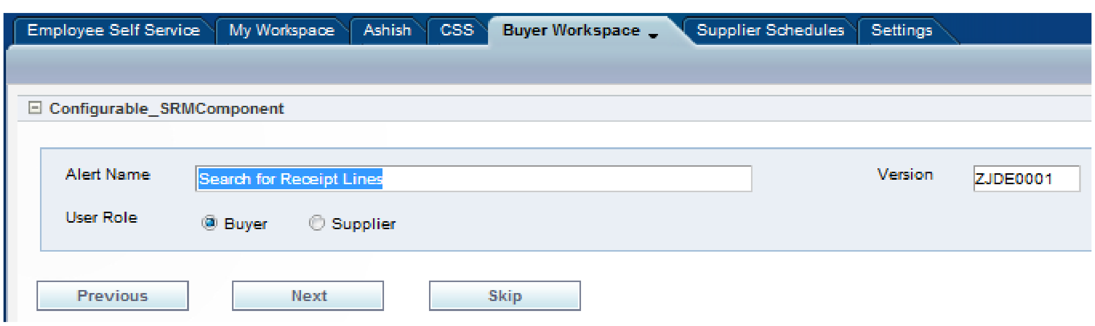
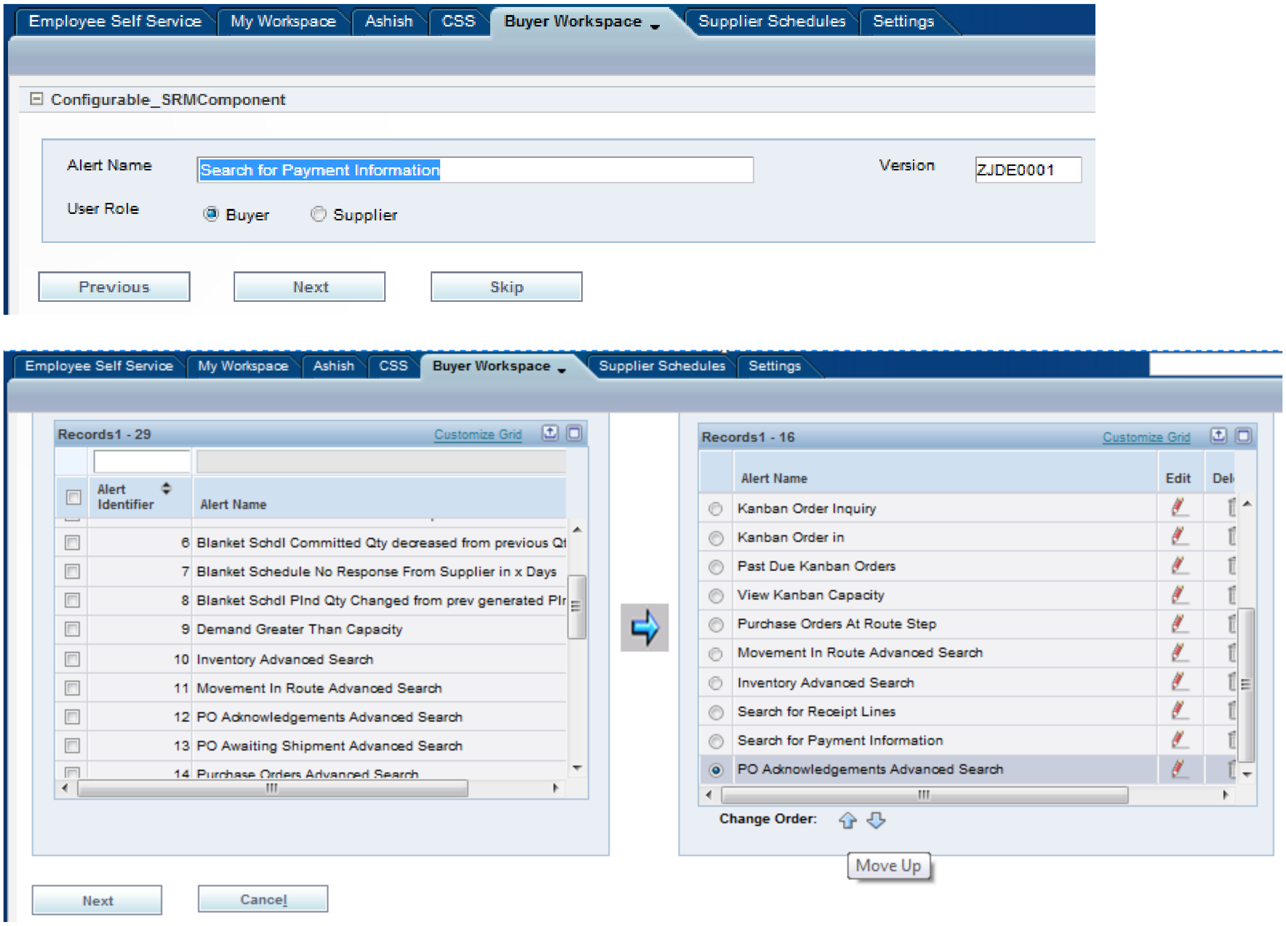
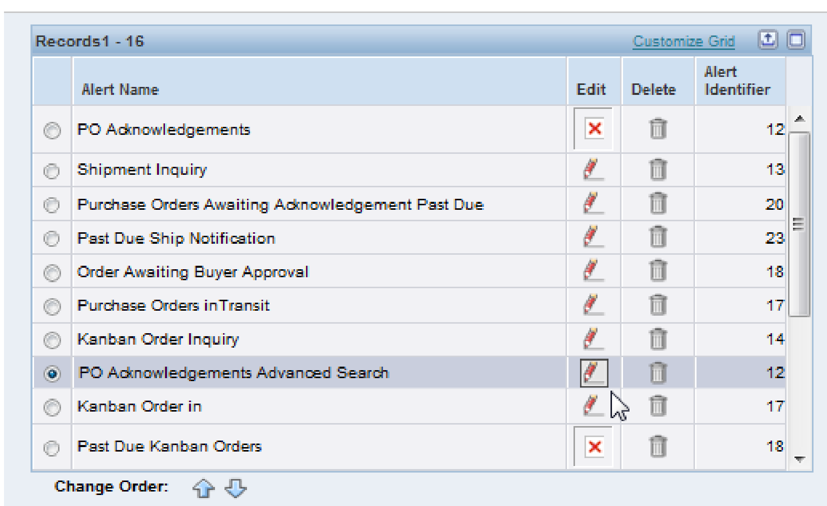


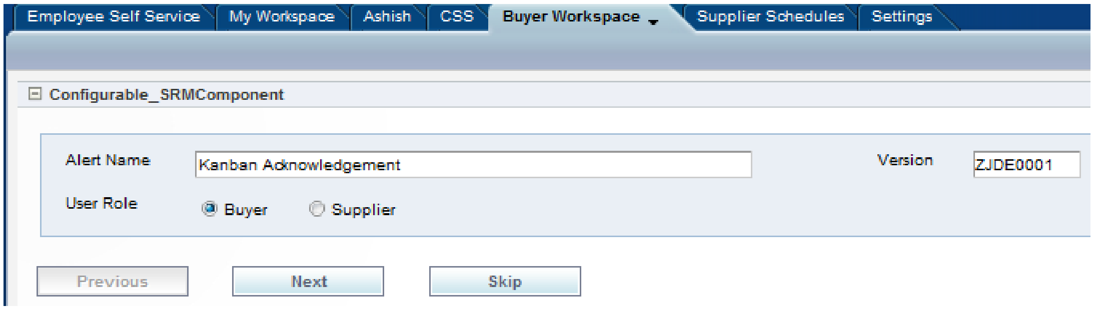
Figure 8–12 Search for Payment Information Alert



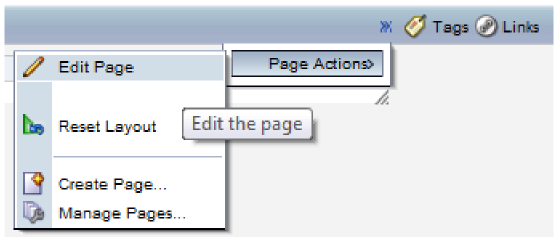
13. The user can still add new alerts to the Selected Alerts grid from the Available Alerts grid. Also, the user can change the order by using the Move Up or Move Down icons as shown in the image below.



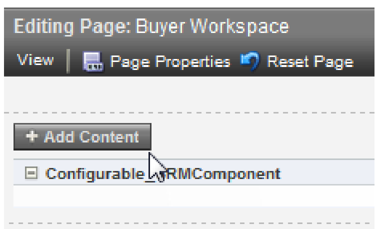
14. The user can update the new alert added by clicking the edit box provided.



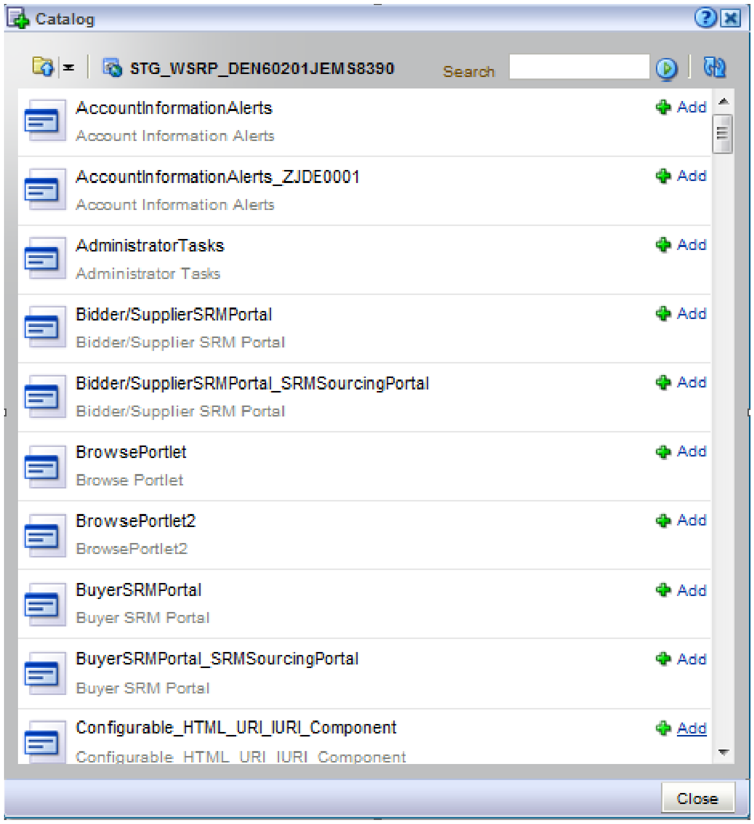
15. Click the *Next* button as shown below after the editing is done. Click the *Cancel* button provided to exit from the configuration screen.



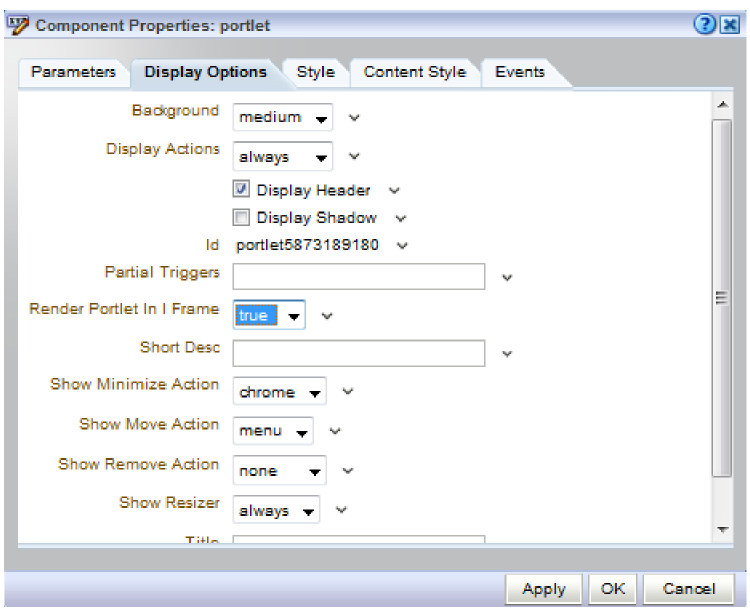
16. Choose *Page Actions*, and then *Edit Page*.



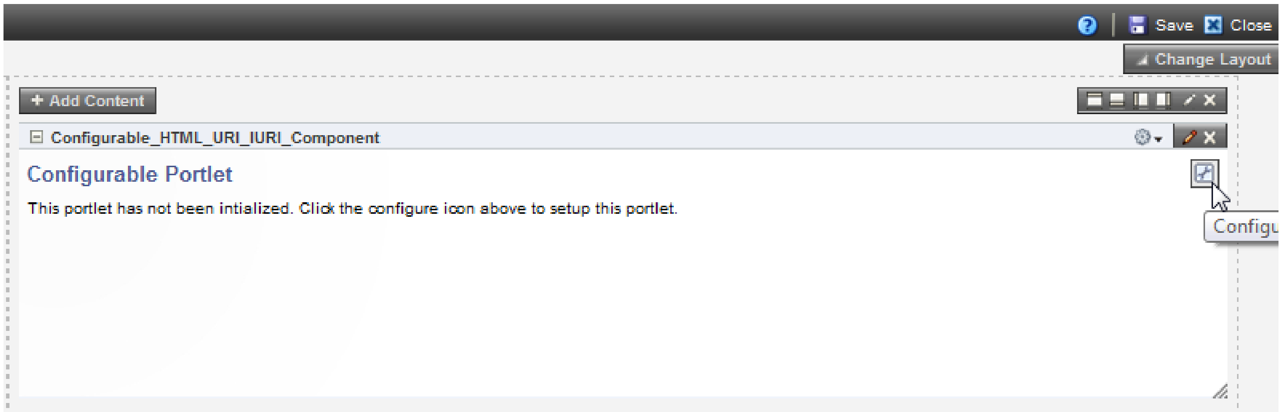
17. Click *Add Content*.



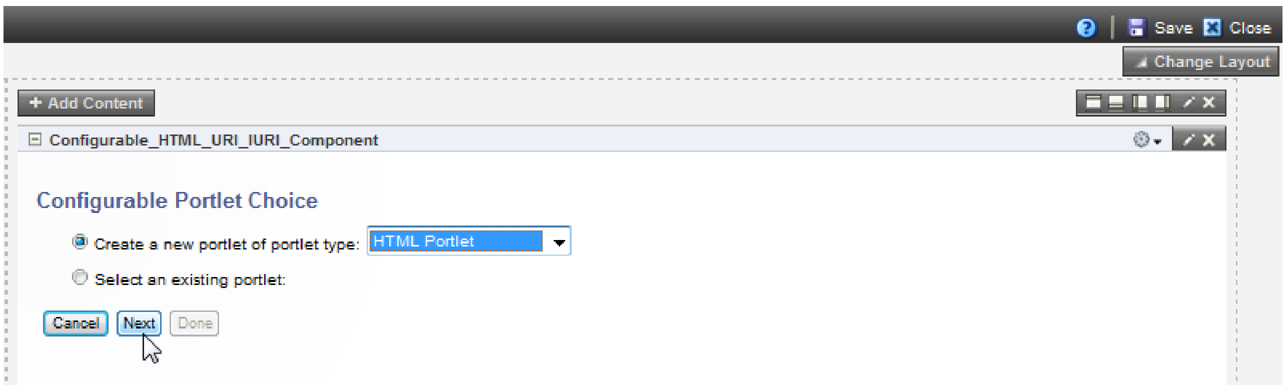
18. Follow the steps 5, 6 and add the Configurable_HTML_URI_IURI_Component from the available list.



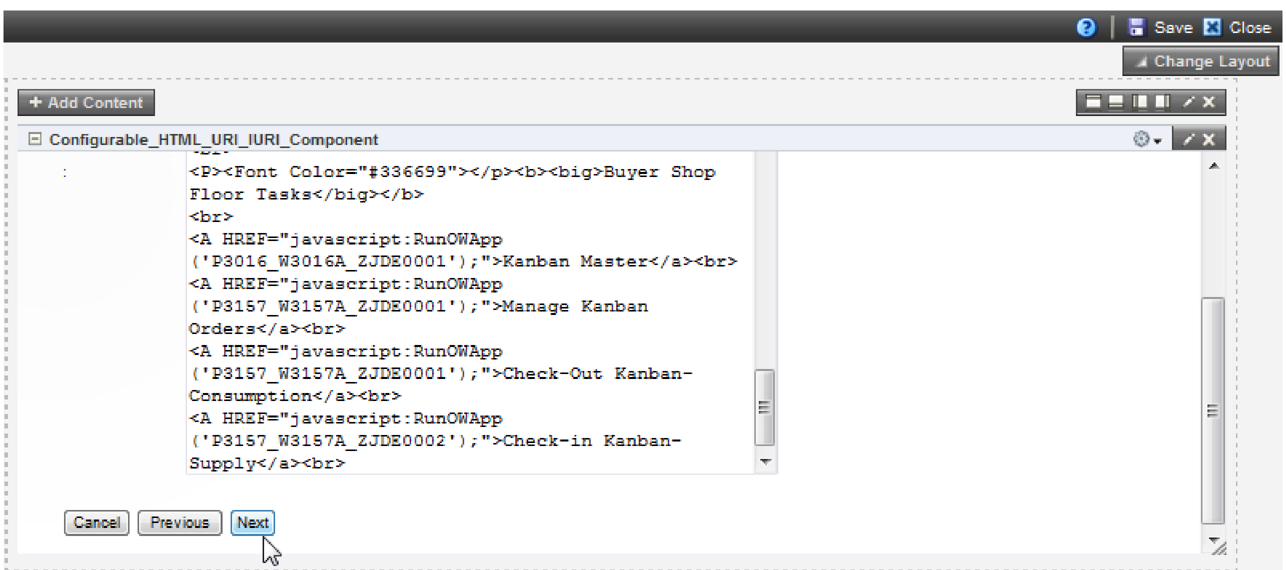
19. Click on the edit button of the portlet and select the *Display Options* tab. Set the property *Render Portlet in I Frame* to true.



20. Click the *Configuration* icon.



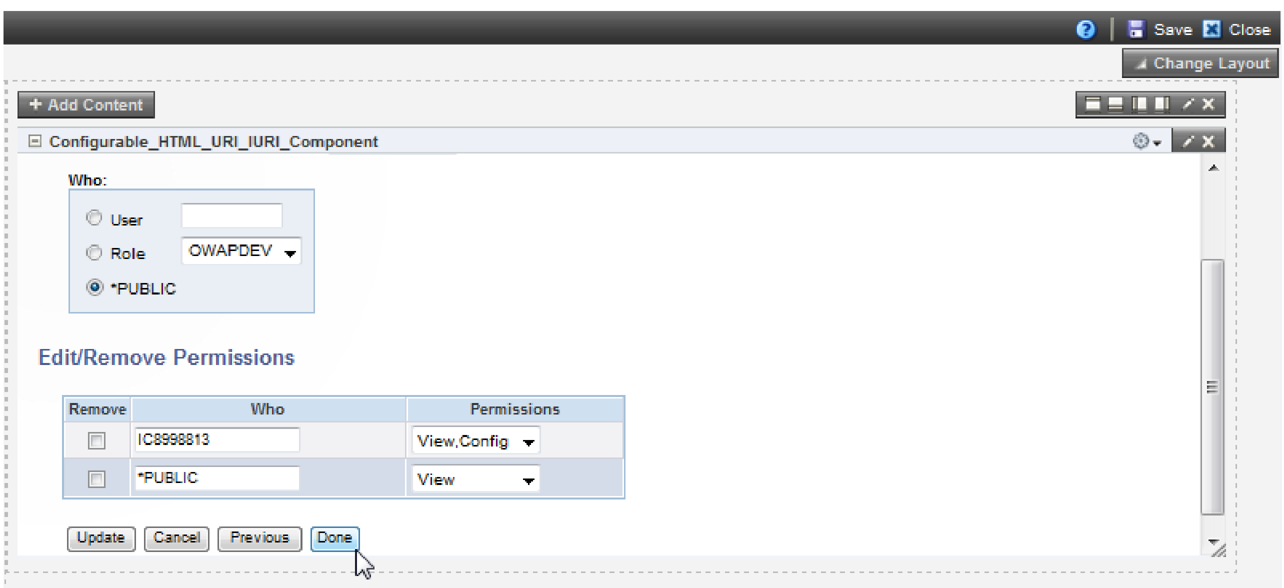
21. Select *HTML Portlet* from the available list and click *Next*.



22. Enter the Name as *BWS* and Title as *BWS* and paste following text in *HTML Code* text area and click the *Next* button.

```
<P><Font Color="#336699"></p><b><big>Procurement Tasks</big></b><br>
<A HREF="javascript:RunOWApp('P4310_W4310I_ZJDE0001');">Enter SRM Purchase
Order</a><br>
<A HREF="javascript:RunOWApp('P4310_W4310G_ZJDE0001');">Manage Open Purchase
```

```
Orders</a><br>
<A HREF="javascript:RunOWApp('P4310_W4310I_ZJDE0003');">Receive PO</a><br>
<A HREF="javascript:RunOWApp('P01012_W01012A_ZJDE0005');">Buyer's Info</a><br>
<A HREF="javascript:RunOWApp('P43090_W43090A_ZJDE0001');">Supplier Item
information</a><br>
<A HREF="javascript:RunOWApp('P04012_W04012D_ZJDE0002');">Purchasing
Instructions</a><br>
<A HREF="javascript:RunOWApp('P43041_W43041A_ZJDE0001');">Purchasing
Ledger</a><br><br>

<br>
<P><Font Color="#336699"></p><b><big>Quote Tasks</big></b>
<br>
<A HREF="javascript:RunOWApp('P4310_W4310I_ZJDE0002');">Quote Order
Entry</a><br>
<A HREF="javascript:RunOWApp('P4310_W4310G_ZJDE0002');">Open Quote
Inquiry</a><br>
<A HREF="javascript:RunOWApp('P4334_W4334B_ZJDE0001');">Enter Quote
Responses</a><br>
<A HREF="javascript:RunOWApp('P43360_W43360H_ZJDE0001');">Generate PO's From
Quotes</a><br>

<br>
<P><Font Color="#336699"></p><b><big>Buyer Shop Floor Tasks</big></b>
<br>
<A HREF="javascript:RunOWApp('P3016_W3016A_ZJDE0001');">Kanban Master</a><br>
<A HREF="javascript:RunOWApp('P3157_W3157A_ZJDE0001');">Manage Kanban
Orders</a><br>
<A HREF="javascript:RunOWApp('P3157_W3157A_ZJDE0001');">Check-Out
Kanban-Consumption</a><br>
<A HREF="javascript:RunOWApp('P3157_W3157A_ZJDE0002');">Check-in
Kanban-Supply</a><br>
```



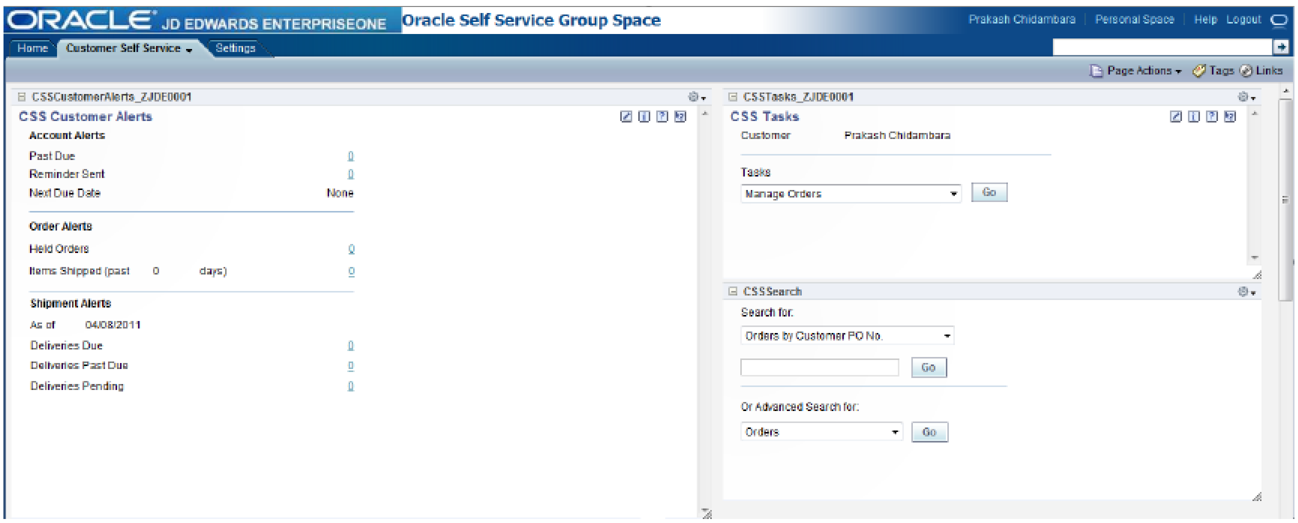
23. Set required permissions and click *Done*.
24. Save the changes made to the portal page and close.

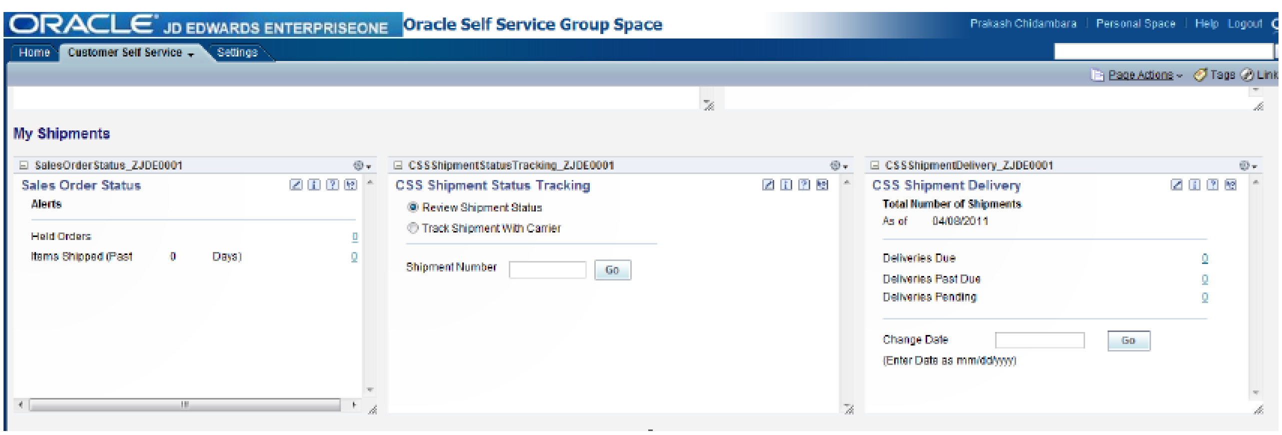
8.4 Creating a Customer Self-Service Portal Page

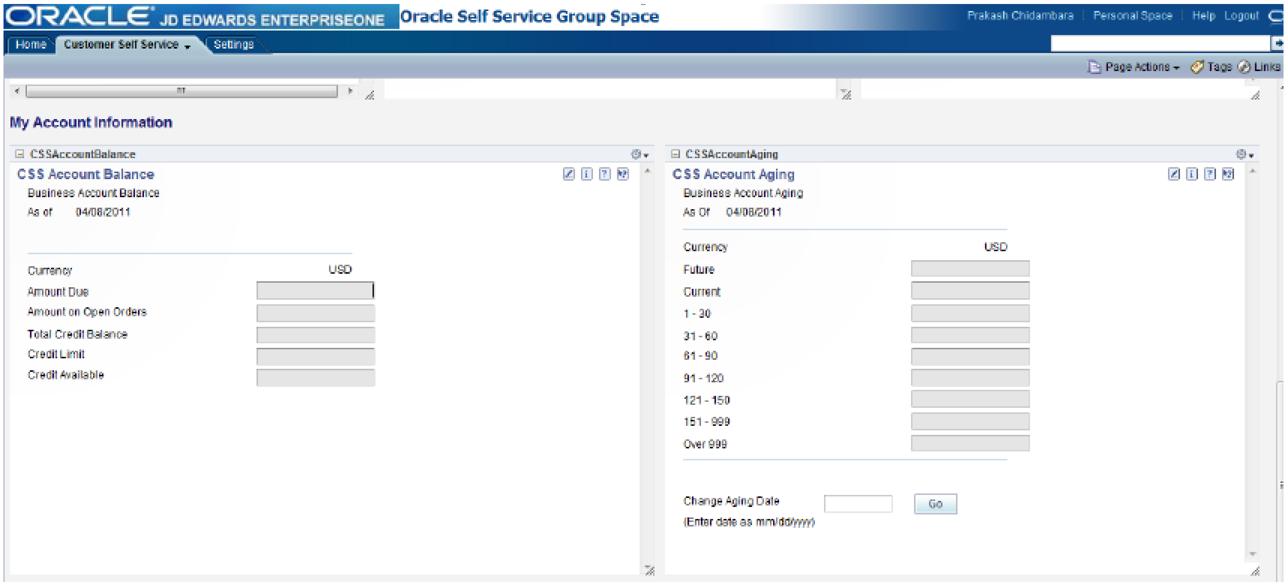
WebCenter Spaces also provides a variety of page layouts (called styles) that you can use to create different types of pages with different layouts. Page types may restrict the type of content that you can add to a page, such as text only, wiki only, blog only, and the like. Page layouts define the number of columns and content areas that define a page's geometry. Layouts are initially determined by the style you select when you create the page. Some page styles inherently allow switching to another page layout, such as wikis and blogs.

In addition to the layouts available through page styles, you can create your own layouts using the layout components available through the Resource Catalog.

The Customer Self Service portal page is created using eight EnterpriseOne FDA portlets. The following three images comprise the Customer Self Service Space:

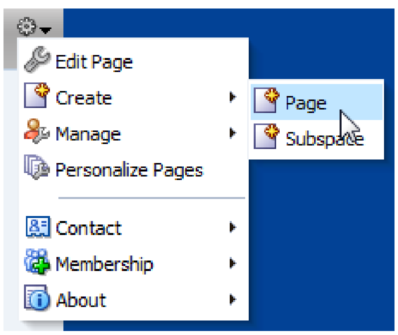




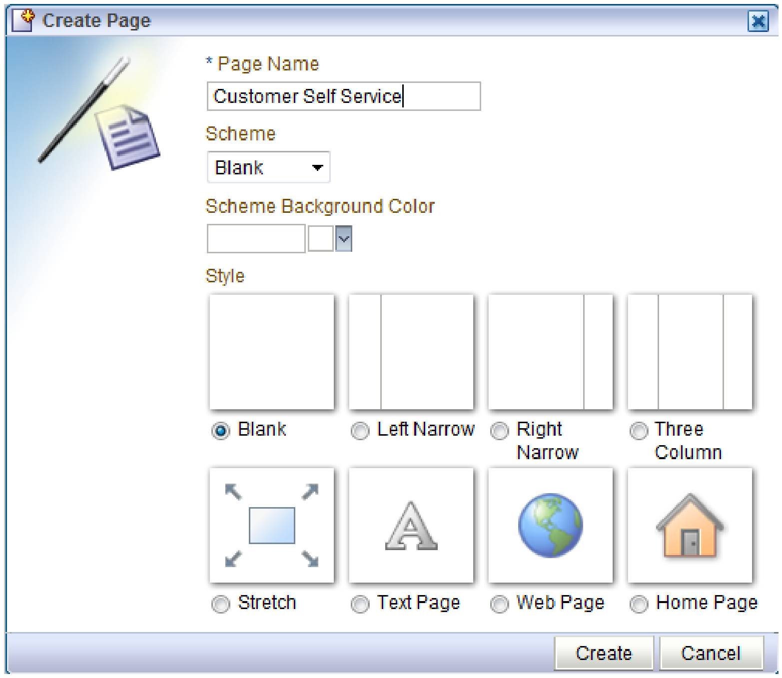


To create the Customer Self Service page:

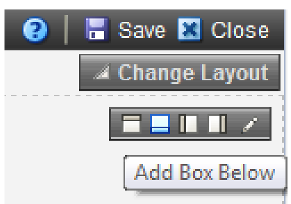
1. Log into WebCenter and access the Oracle Self Service Space the was created in the previous section.



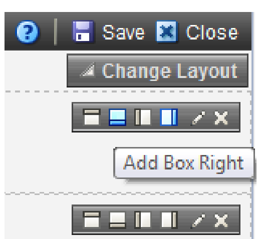
2. Click the Page Actions dropdown arrow, then select Create, and then Page.



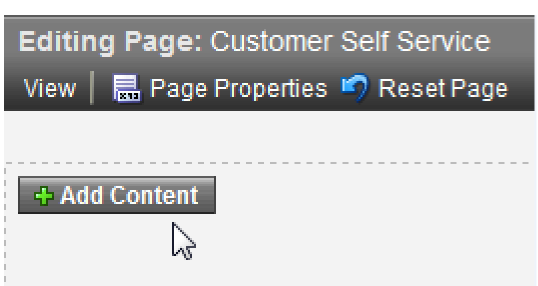
3. Enter the Page Name as *Customer Self Service* and let the Scheme be Blank and click Create button. This will show Customer Self Service page in Edit mode having only one column.



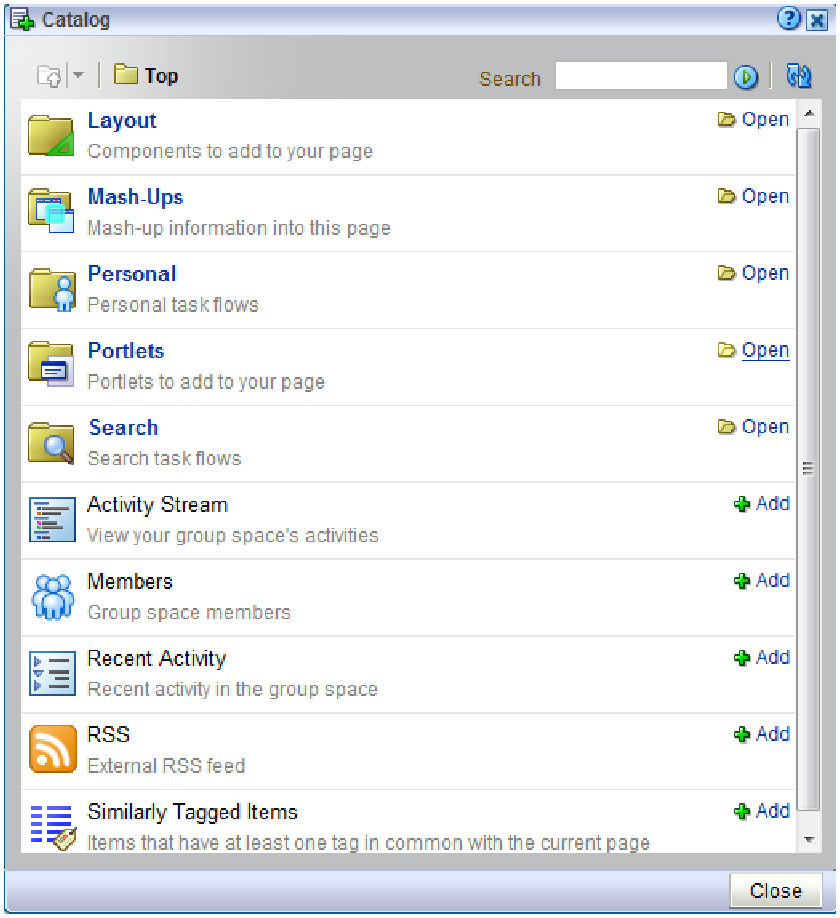
4. Click *Add box below*.



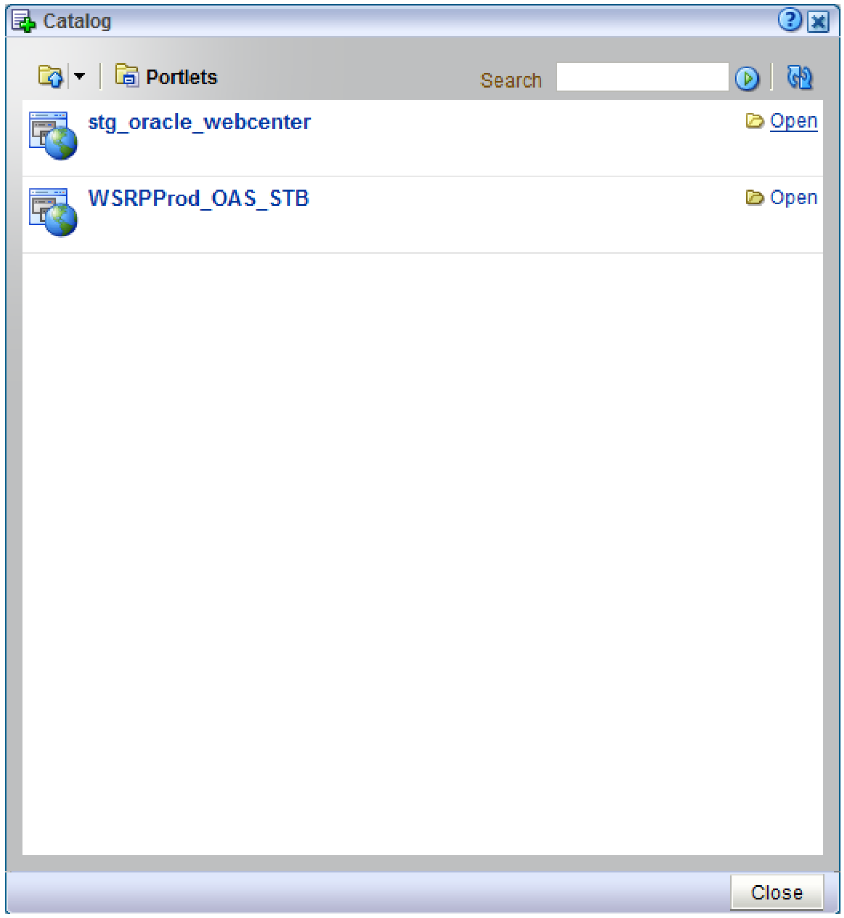
5. Click *Add box right*.



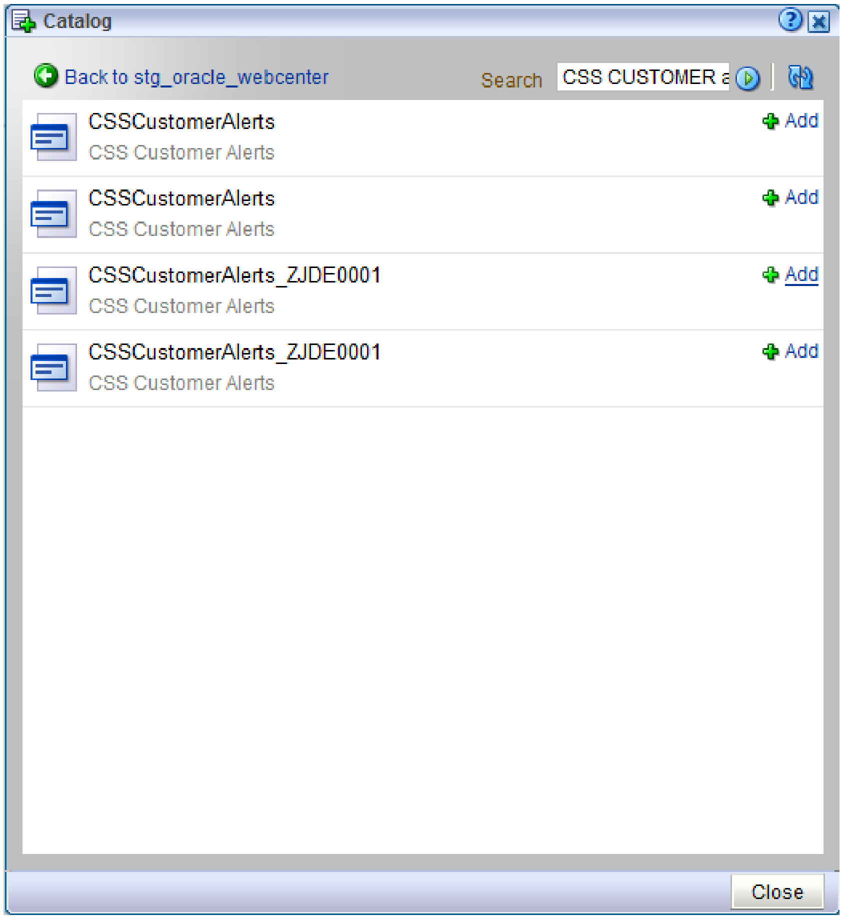
6. Click the *Add Content* button to add EnterpriseOne portlets.



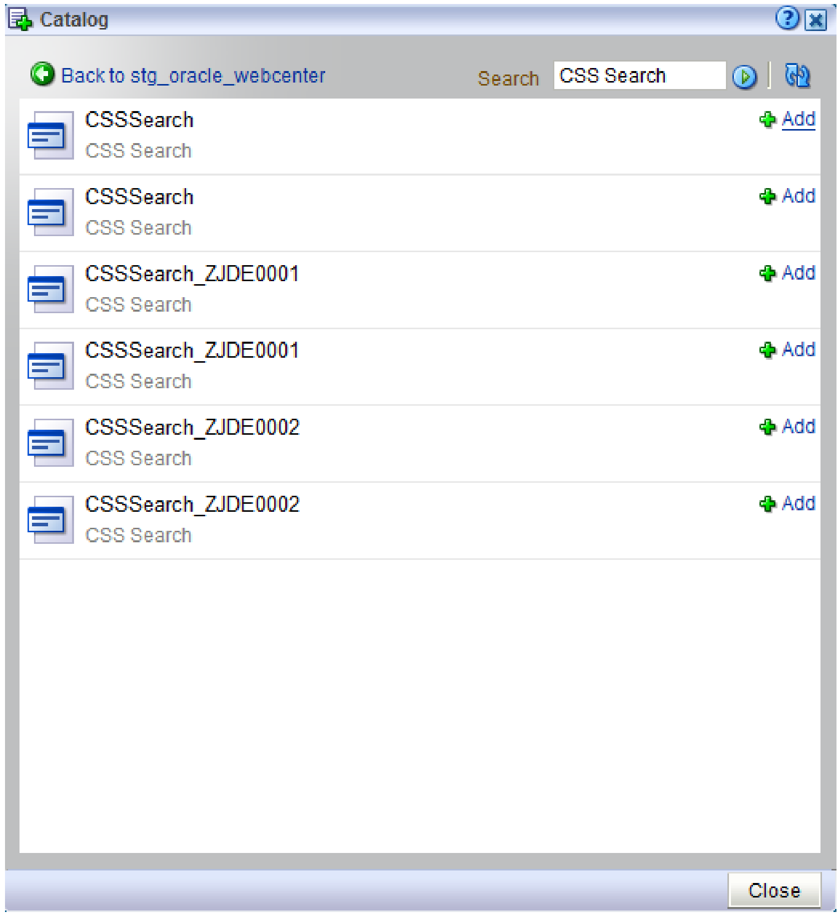
7. Click *Portlets* to open the Portlets catalog.



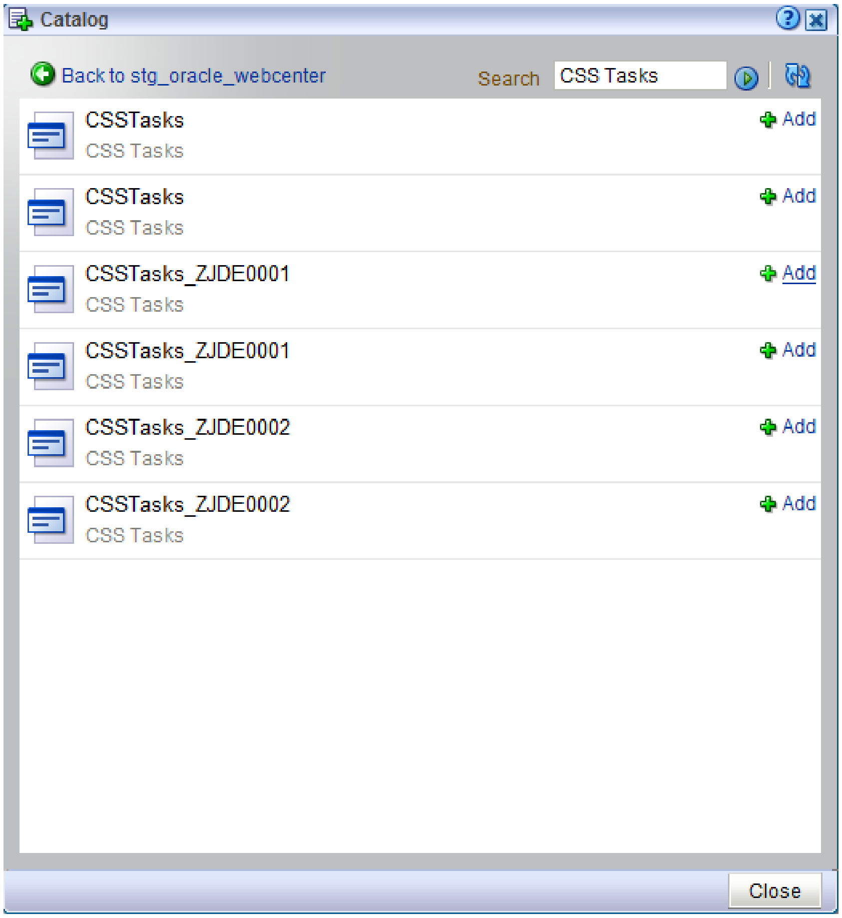
8. Select *stb_oracle_webcenter* (this name could be different on your setup) to see the list of E1 portlets available.



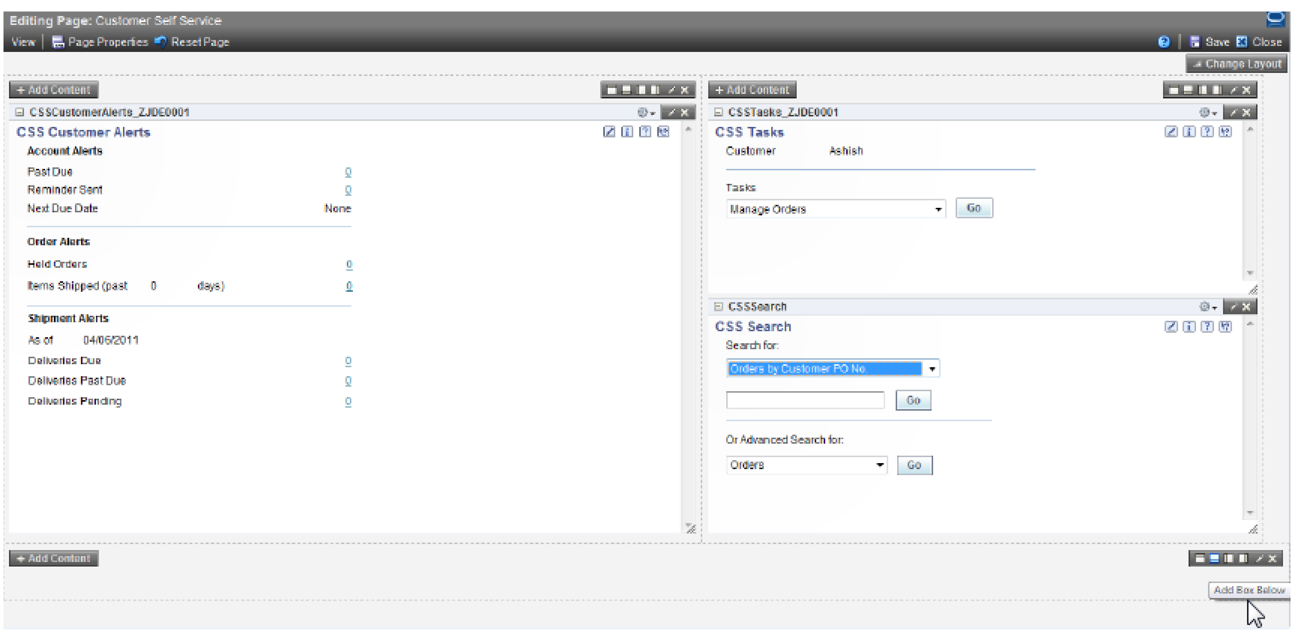
9. To add the CSSCustomerAlerts portlet to the left pane, search for the string *CSSCustomerAlerts* to find the list of CSSCustomerAlerts portlets available and select one.



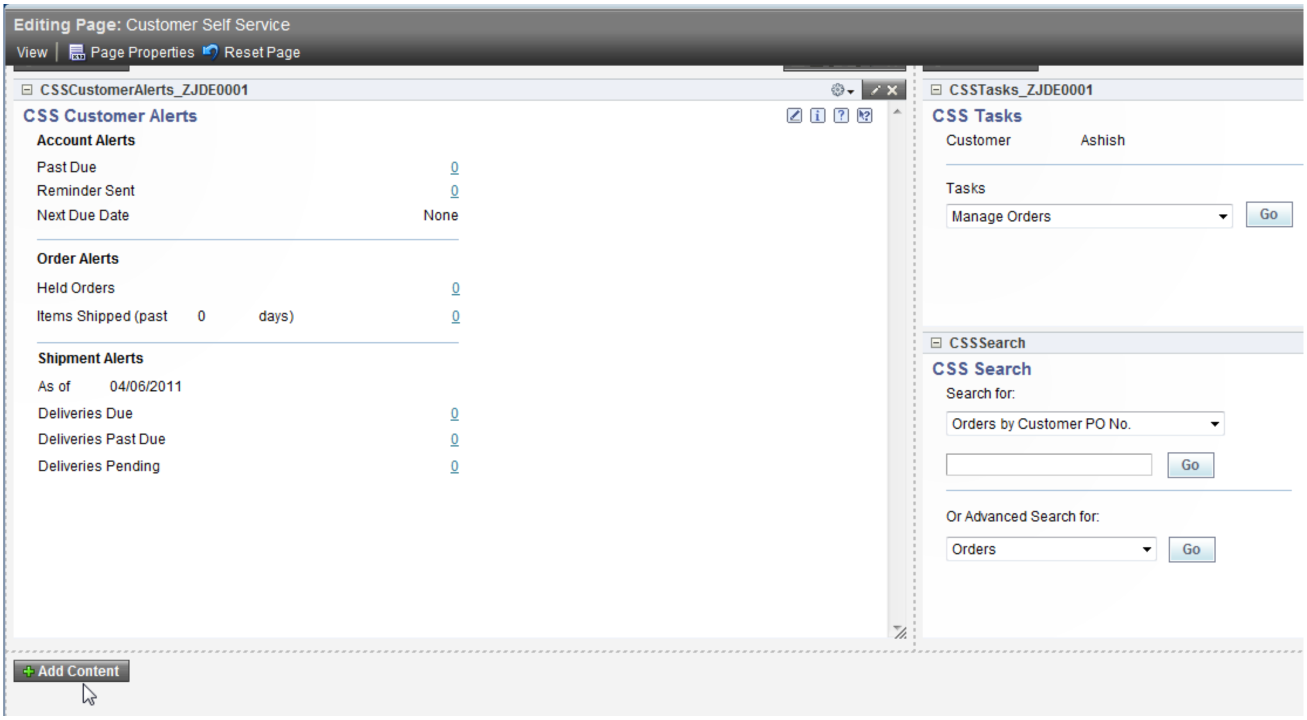
10. Follow the steps 5, 6 and 7 on the right pane of the EnterpriseOne portlet and add the CSS Search portlet from the list of CSS Search portlets available.



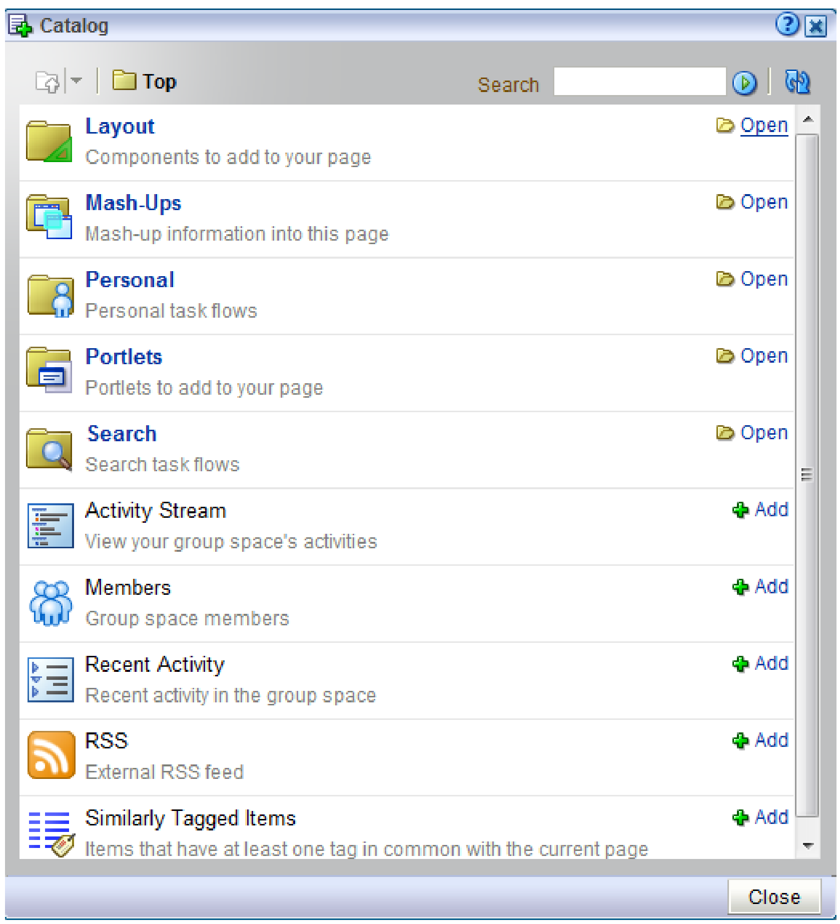
11. Follow the steps 5, 6 and 7 on the right pane of the EnterpriseOne portlet and add the CSS Tasks portlet from the list of CSS Tasks portlets available.



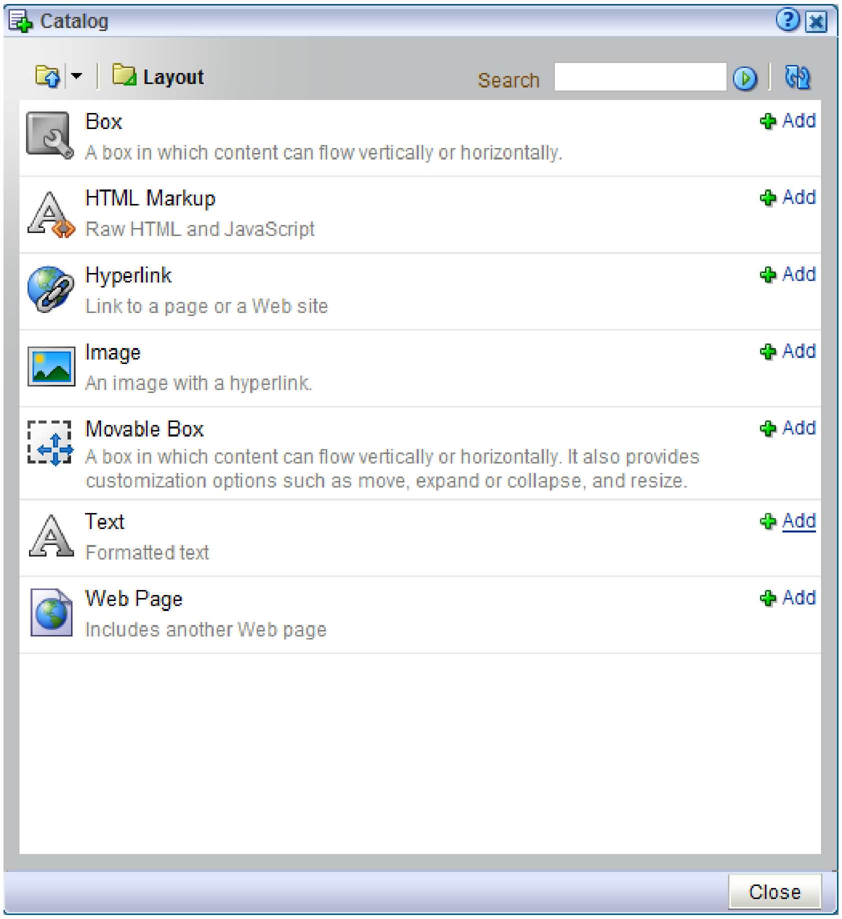
12. Click on *Add box below*.



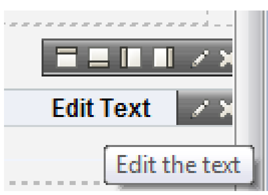
13. Click *Add Content*.

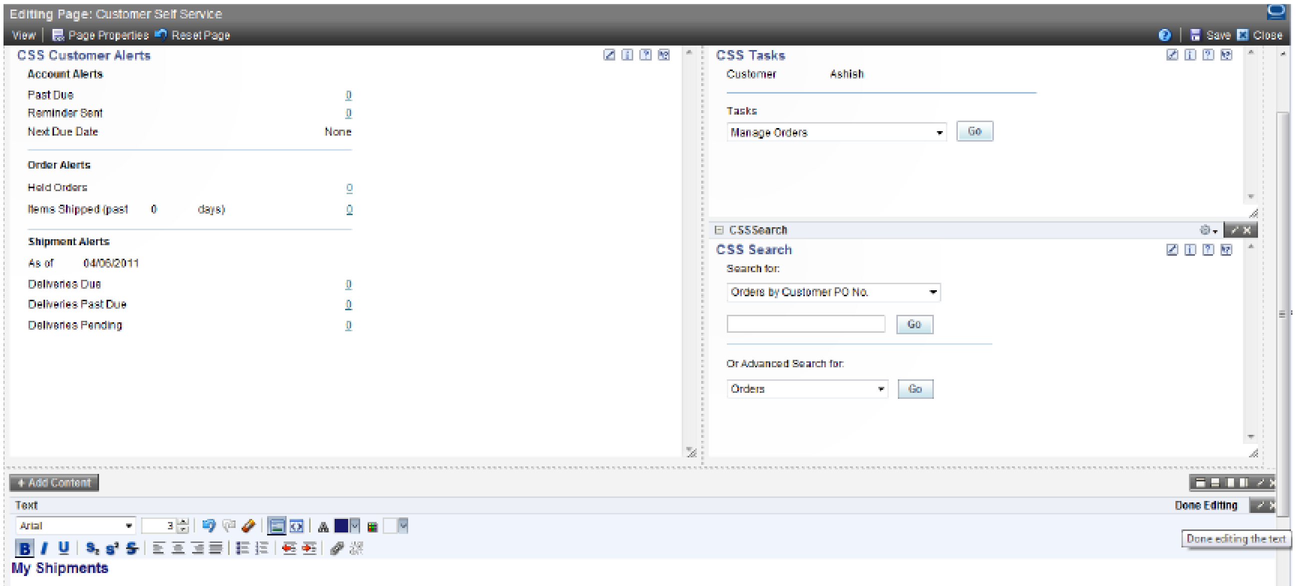


14. Click *Layout* to open the Layout catalog.

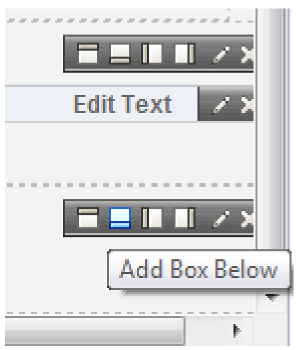


15. Select *Text*.

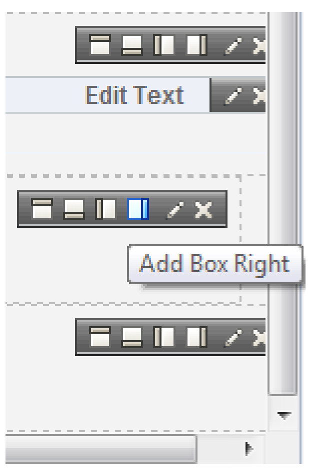




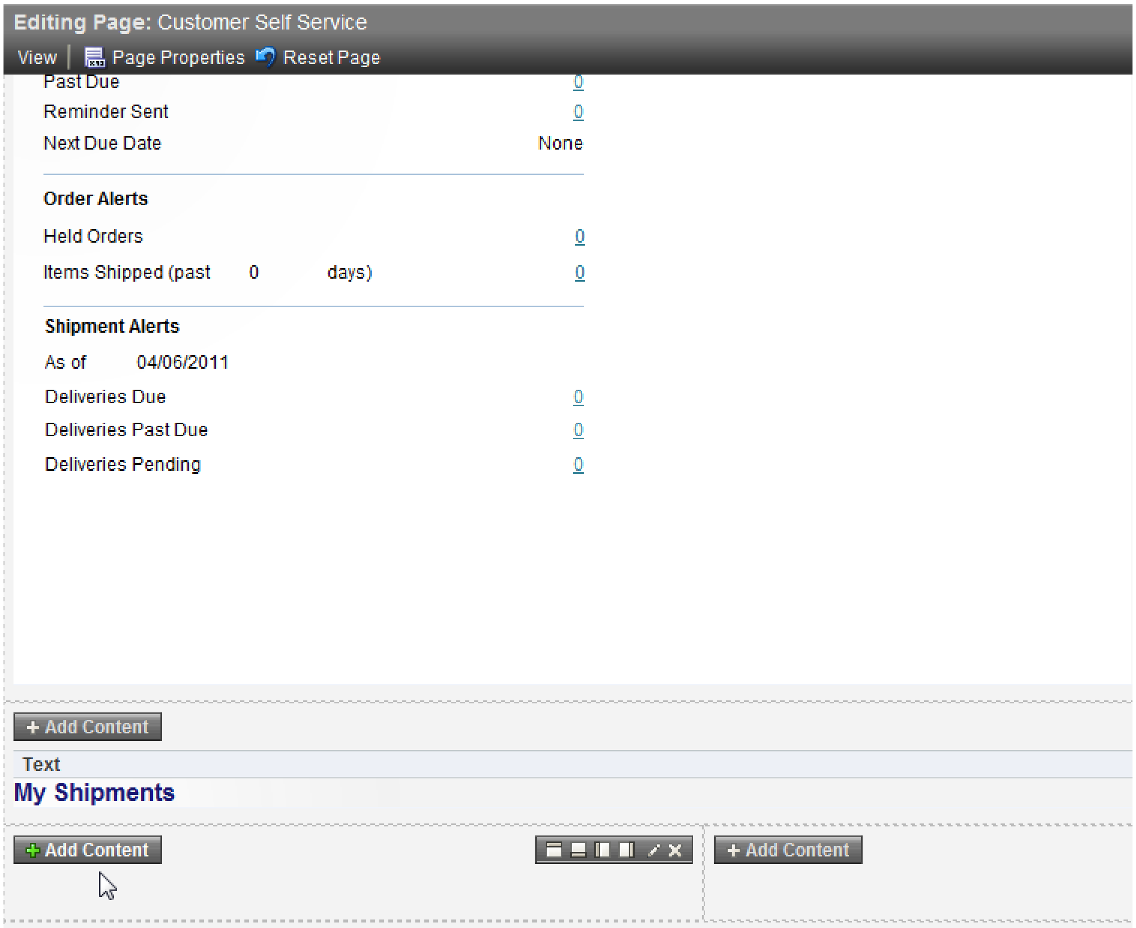
16. Format the text as shown in these images:



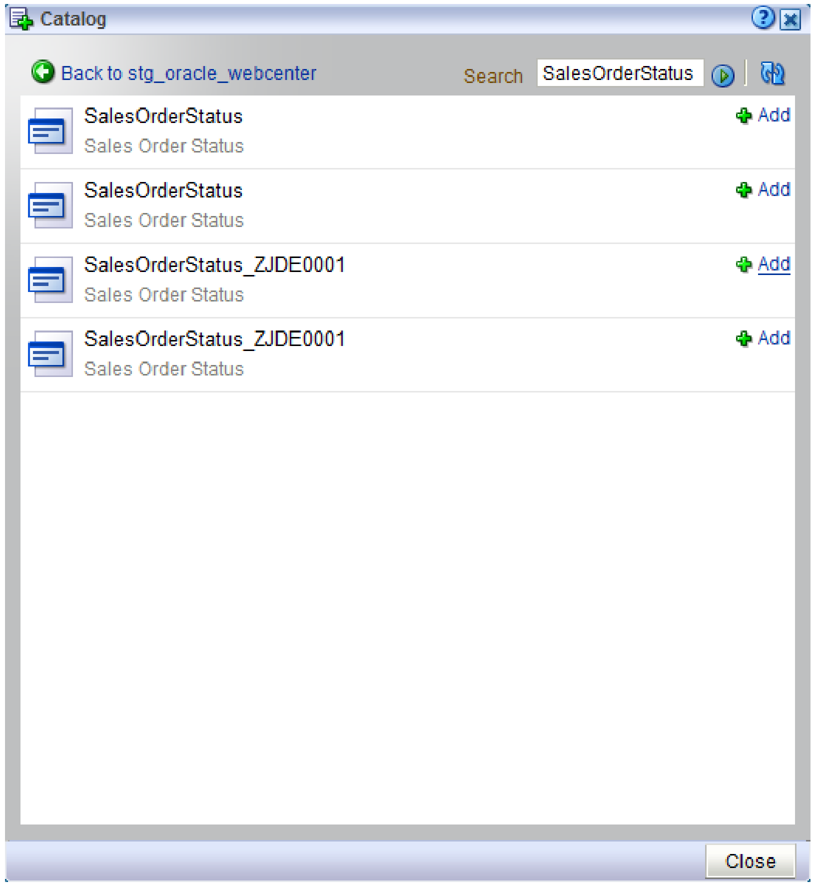
17. Click on *Add Box Below*.



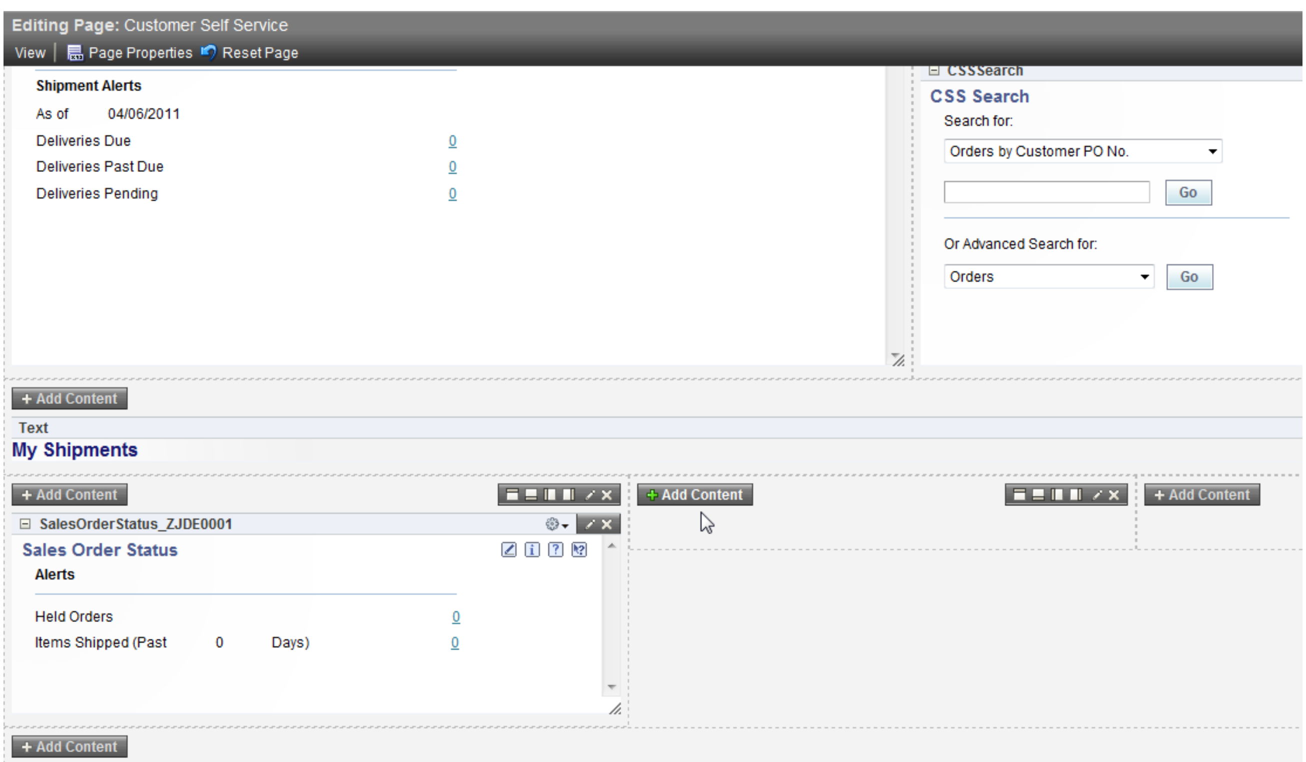
18. Click on *Add Box Right*.



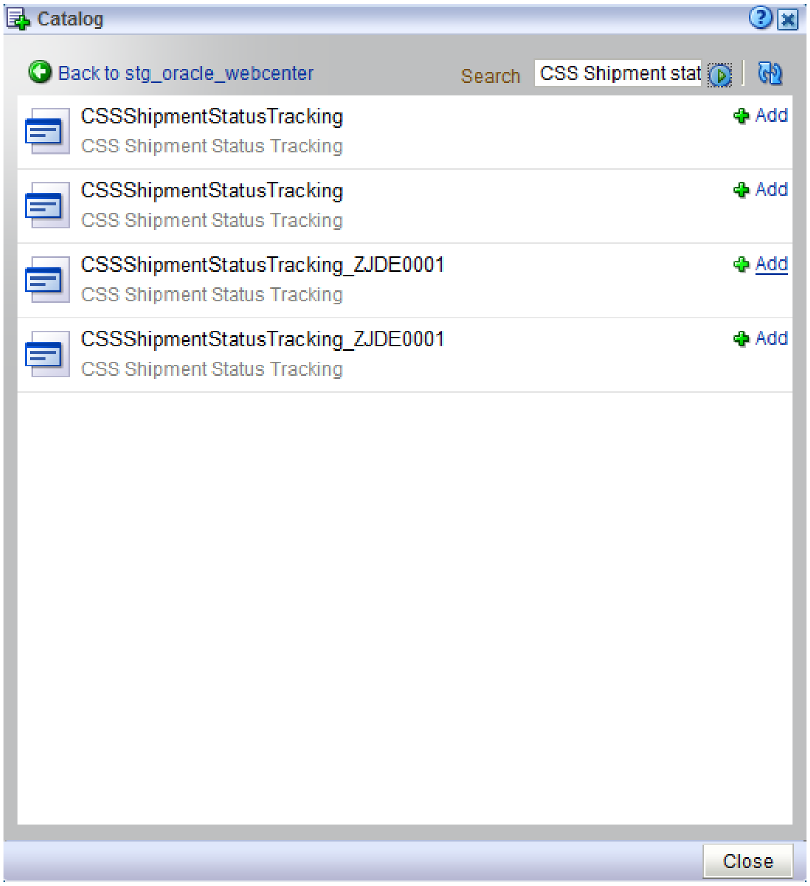
19. Click *Add Content* to add the EnterpriseOne portlet as shown in the image below for the left pane.



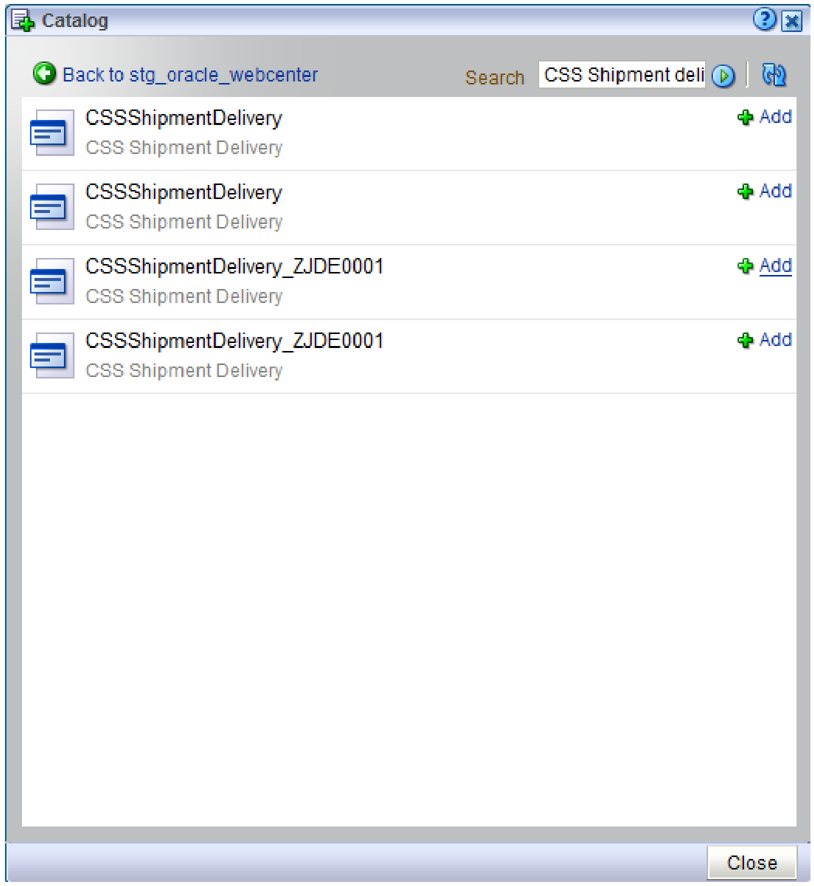
20. Follow the steps 5, 6 and 7 on the left pane of the EnterpriseOne portlet and add the Sales Order Status portlet from the list of Sales Order Status available.



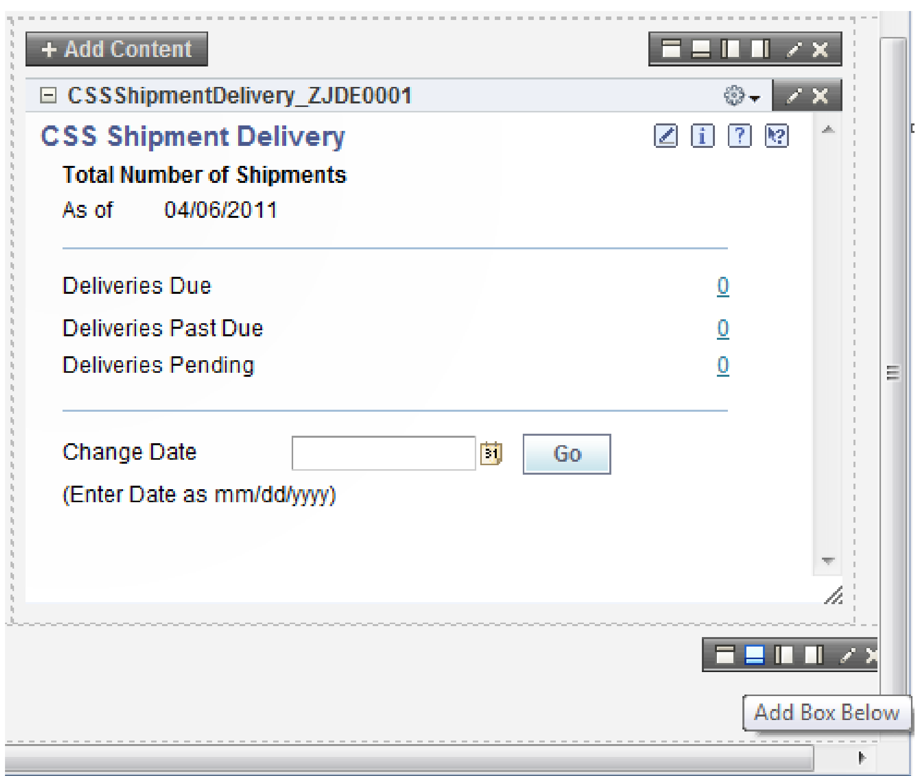
21. Click *Add Content* to add EnterpriseOne portlet as shown in the image below for the center pane.



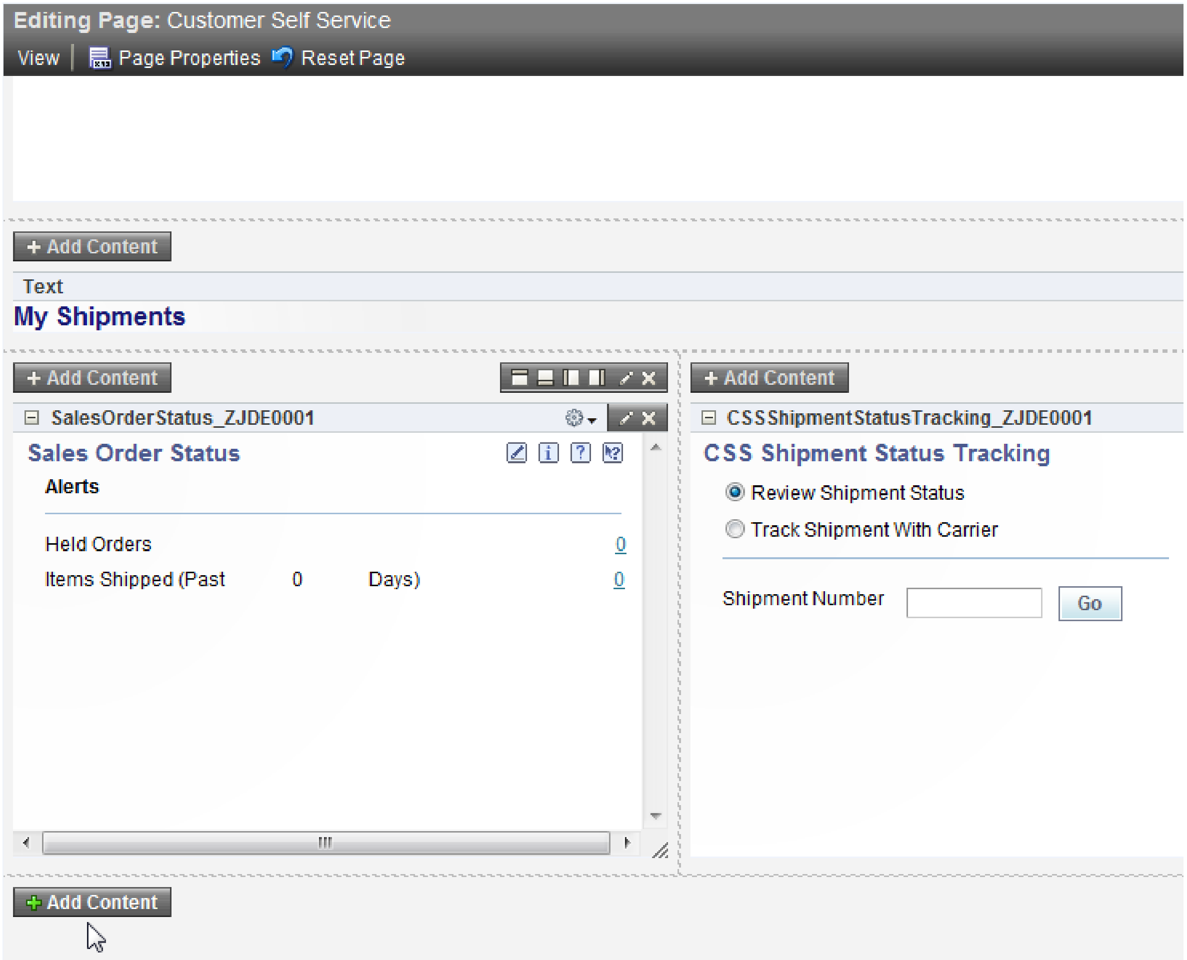
22. Follow the steps 5, 6 and 7 on the center pane of the E1 portlet and add the CSS Shipment Status Tracking portlet from the list of CSS Shipment Status Tracking available.



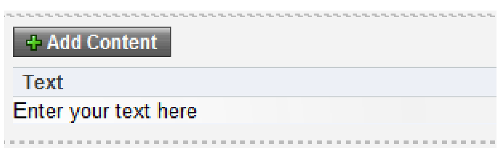
23. Follow the steps 5, 6 and 7 on the right pane of the E1 portlet and add the CSS Shipment Delivery portlet from the list of CSS Shipment Delivery available.

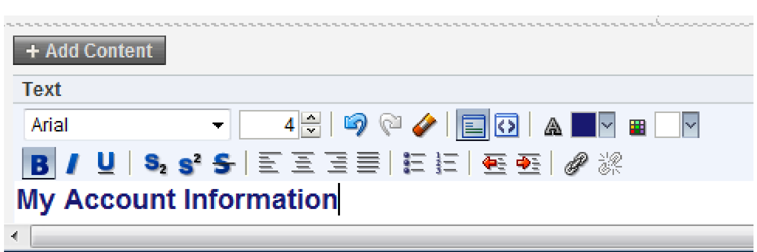


24. Click on *Add box below*.

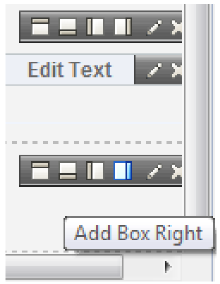


25. Click *Add Content* to add layout portlet.

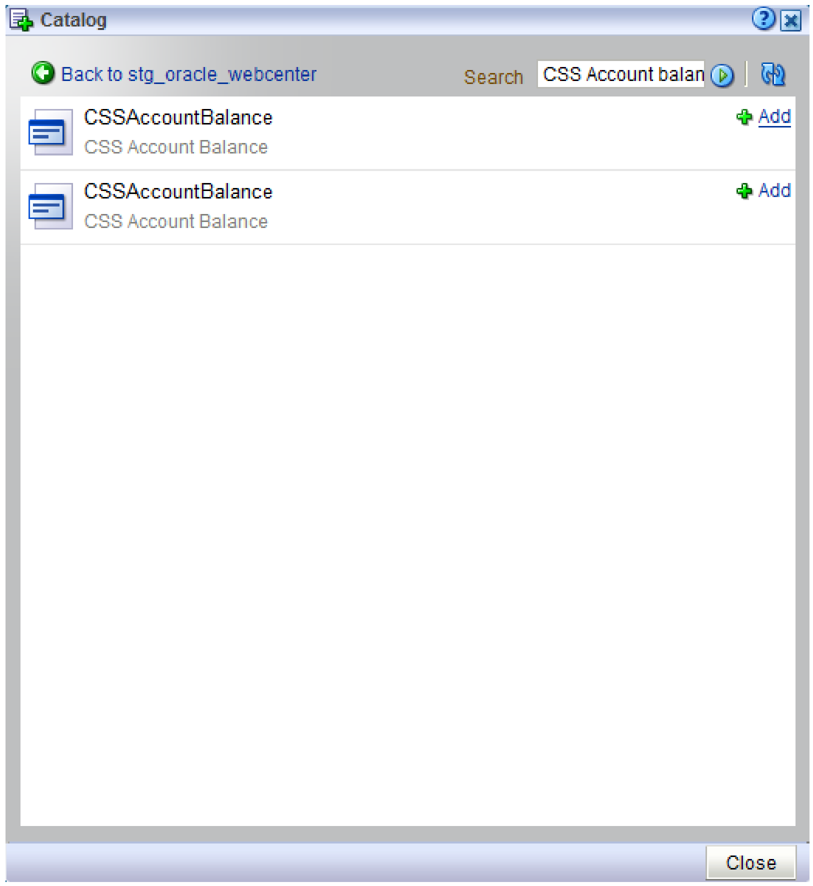




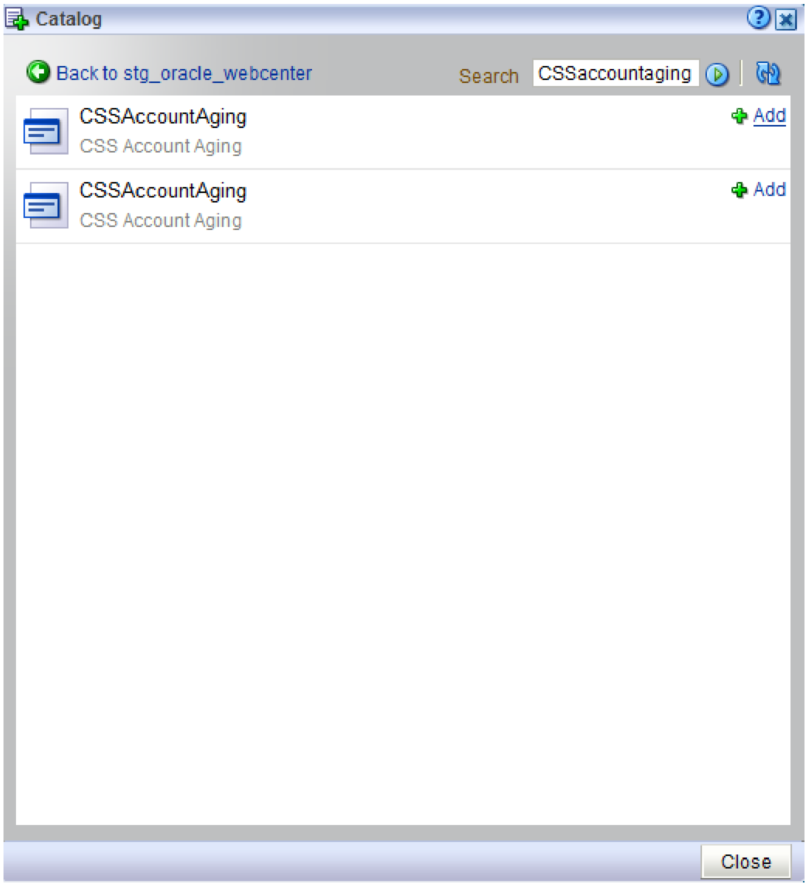
26. Follow steps 13 and 14 and format the text as shown in the following images:



27. Click on *Add box right*.



28. Follow the steps 5, 6 and 7 on the left pane of the E1 portlet and add the CSS Account Balance portlet from the list of CSS Account Balance available.



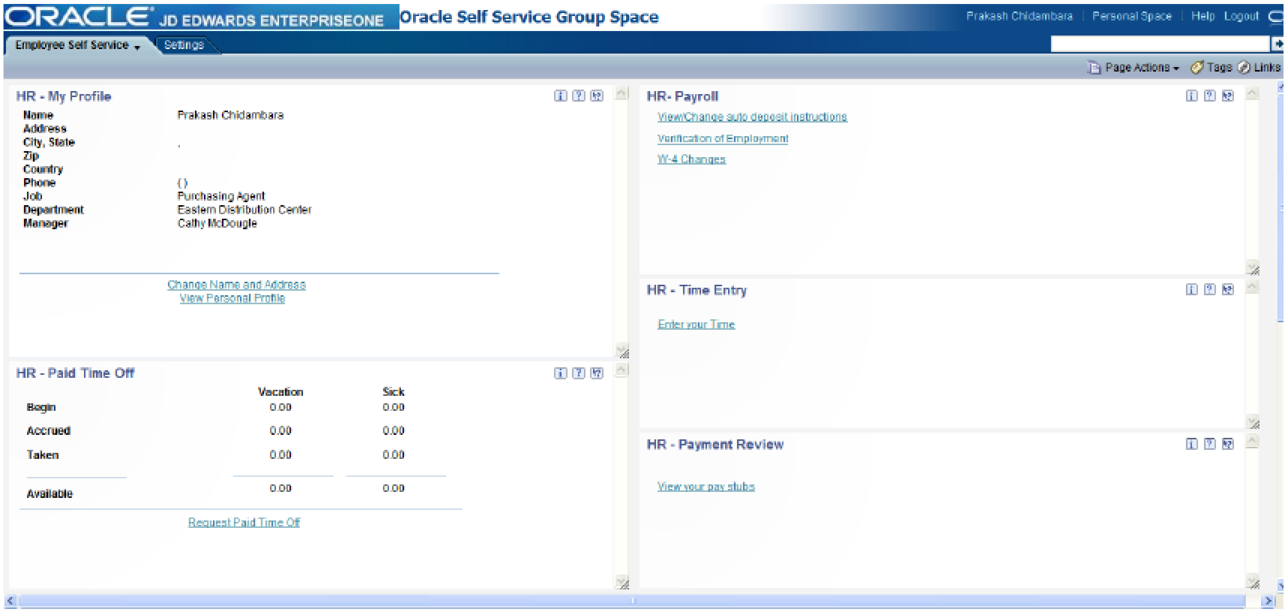
29. Follow the steps 5, 6 and 7 on the right pane of the E1 portlet and add the CSS Account Aging portlet from the list of CSS Account Aging available.

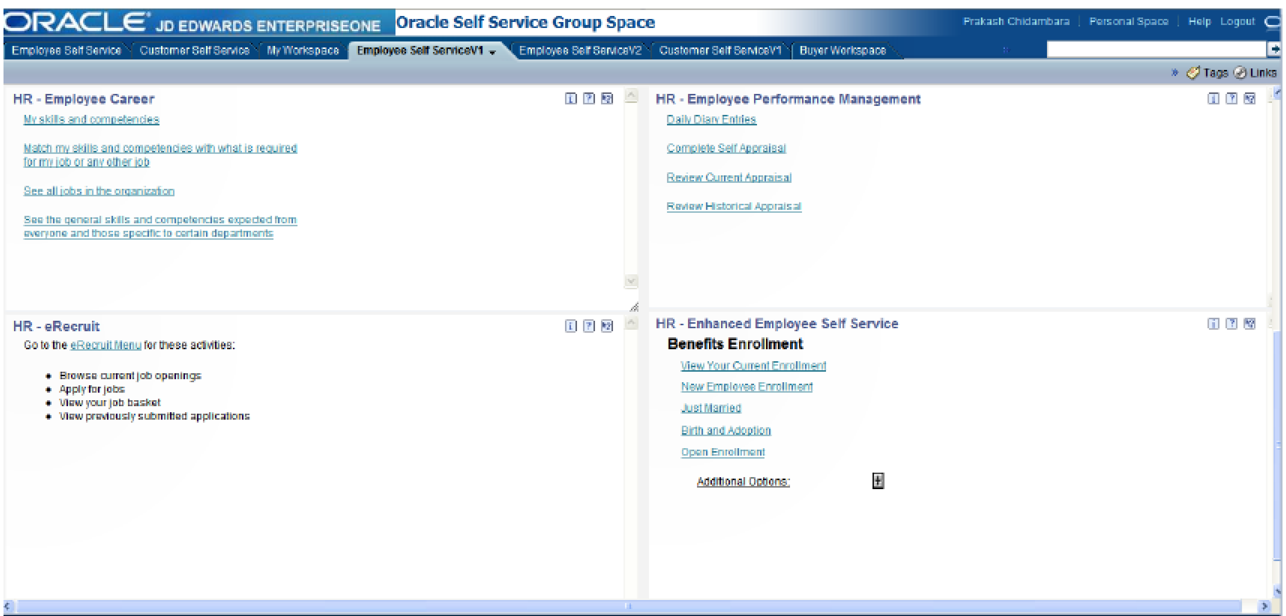
8.5 Creating an Employee Self-Service Portal Page

WebCenter Spaces also provides a variety of page layouts (called styles) that you can use to create different types of pages with different layouts. Page types may restrict the type of content that you can add to a page, such as text only, wiki only, blog only, and the like. Page layouts define the number of columns and content areas that define a page's geometry. Layouts are initially determined by the style you select when you create the page. Some page styles inherently allow switching to another page layout, others, such as wikis and blogs.

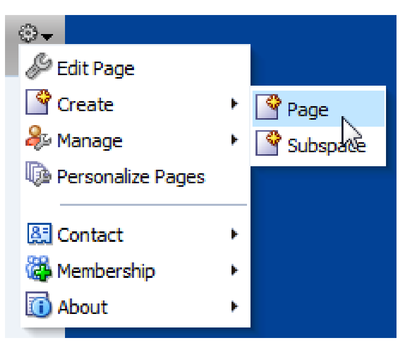
In addition to the preceded layouts available through page styles, you can create your own layouts using the layout components available through the Resource Catalog.

The Employee Self Service portal page is created using nine EnterpriseOne FDA portlets. The following images comprise the Employee Self Service portal page.

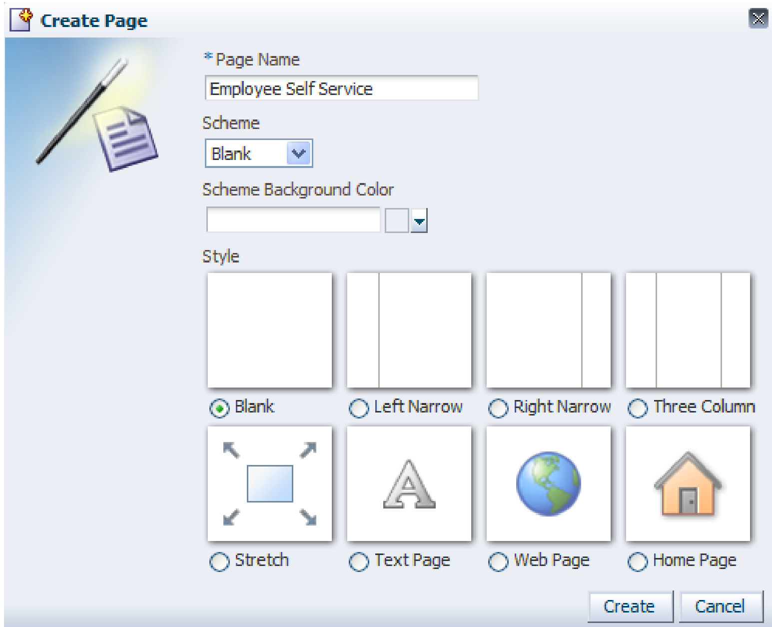




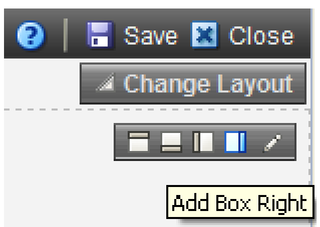
To create the Employee Self Service page:



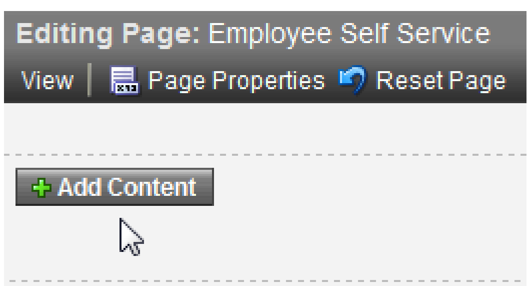
1. Click the Page Actions dropdown arrow, then select Create, and then Page.



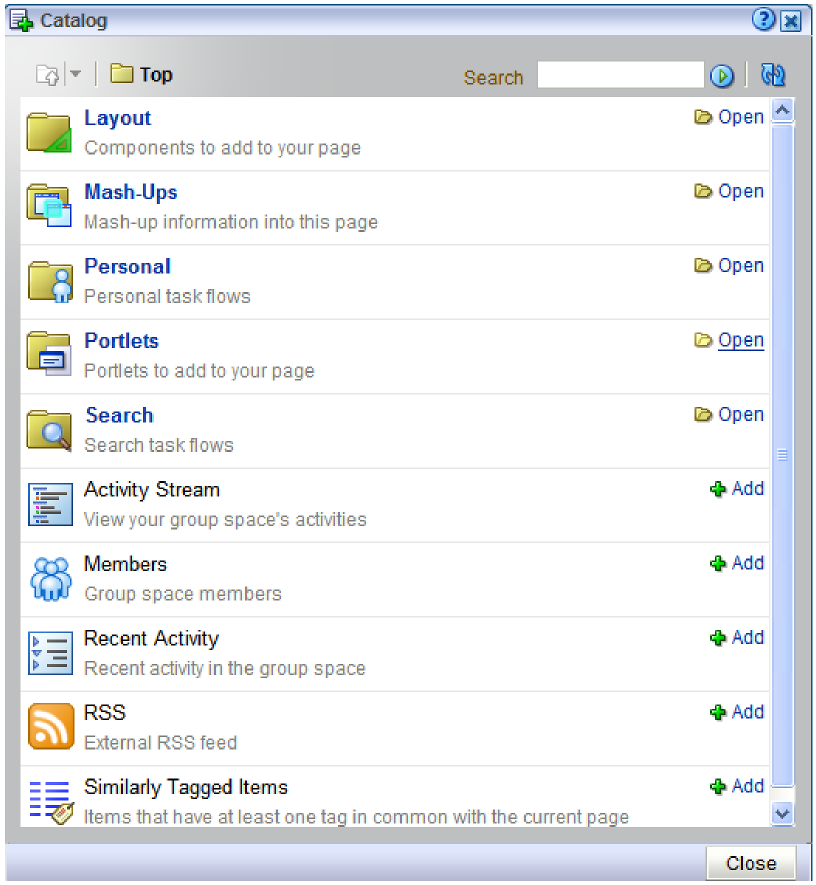
2. Enter the Page Name as *Employee Self Service* and let the Scheme be Blank. Click the Create button. This will show Customer Self Service page in Edit mode with only one column.



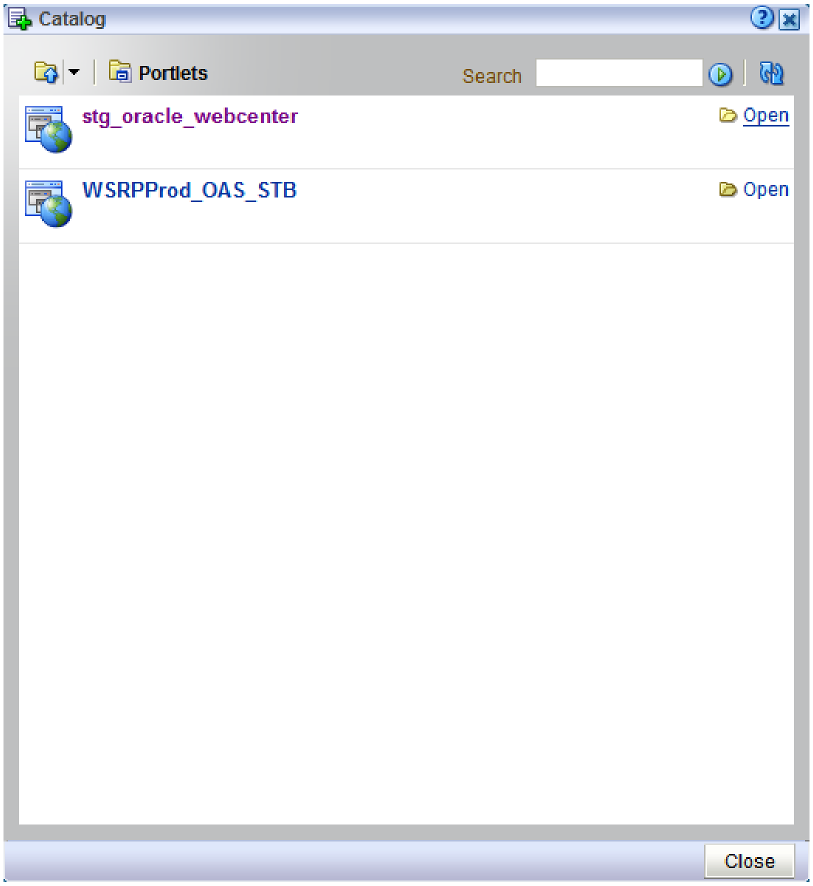
3. Click on *Add Box Right*.



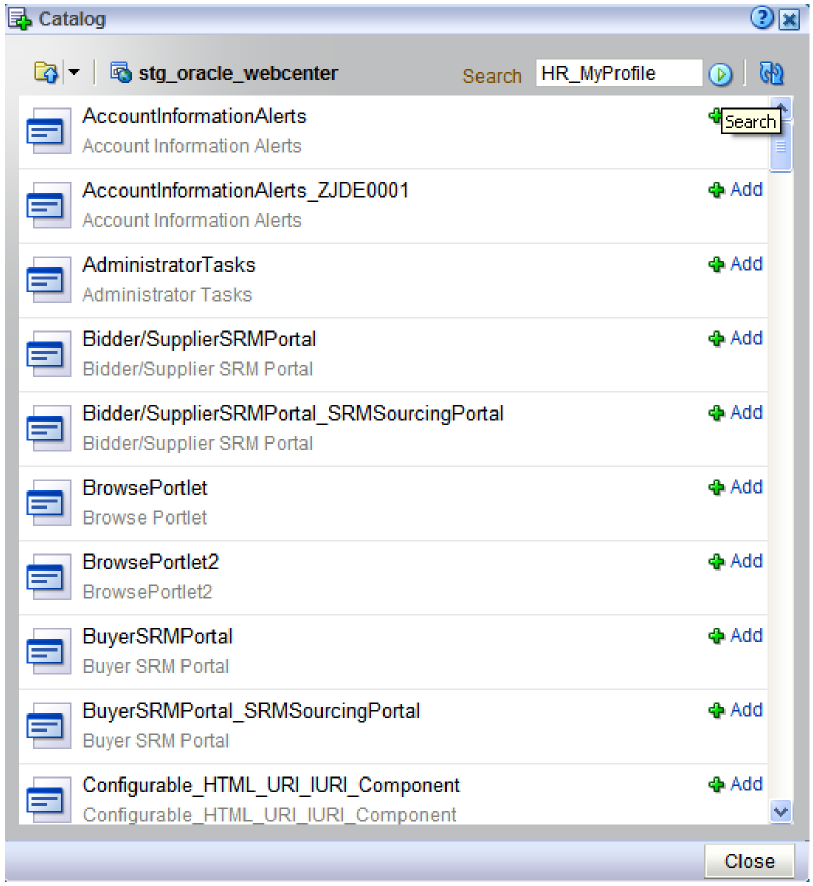
4. Click *Add Content* to add E1 portlets.



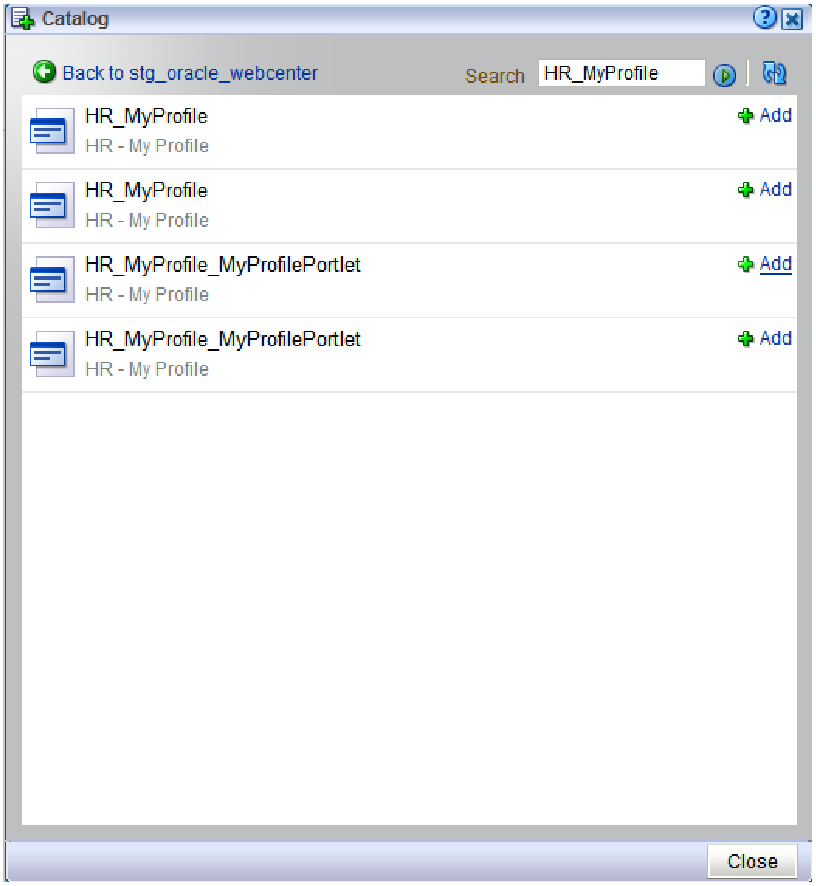
5. Open the *Portlets* catalog.



6. Select *stb_oracle_webcenter* (this name could be different on your setup to see the list of E1 portlets available.



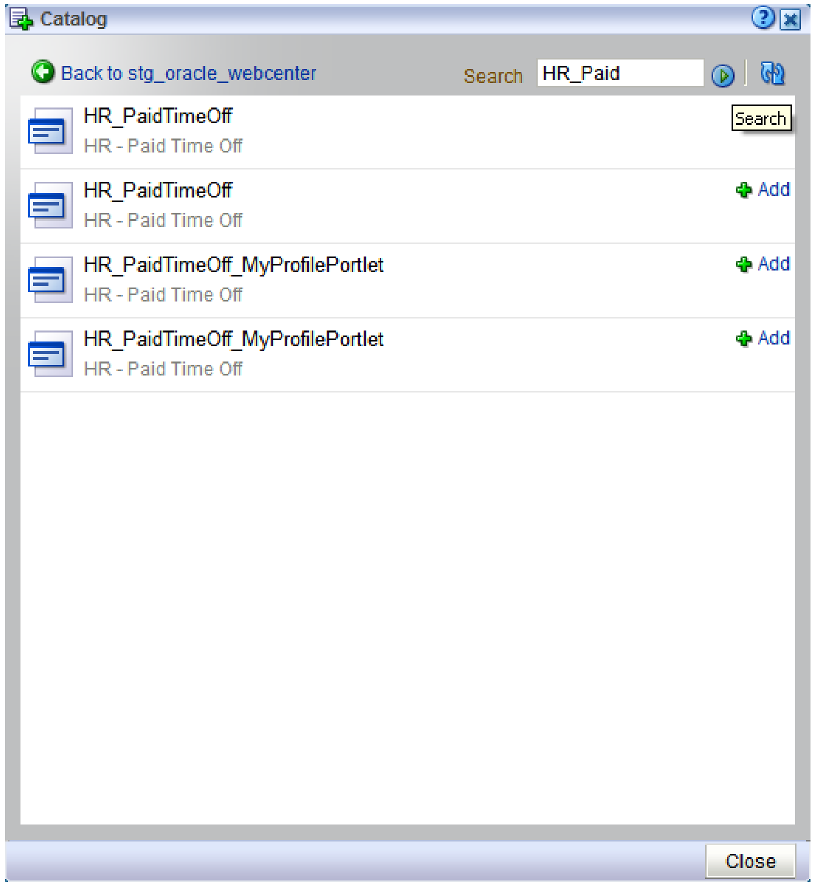
This image shows the beginning of the list of available portlets:



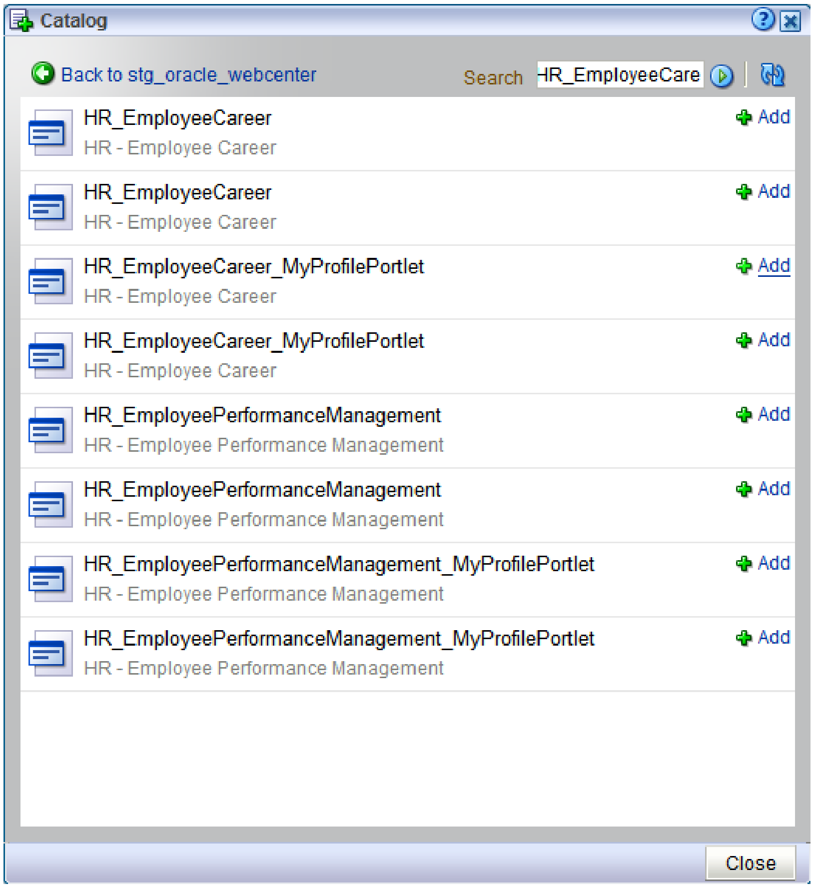
7. On the Employee Self Service page, the left pane has these portlets in this order:

   - HR - My Profile
   - HR - Paid Time Off
   - HR - Employee Career
   - HR - eRecruit

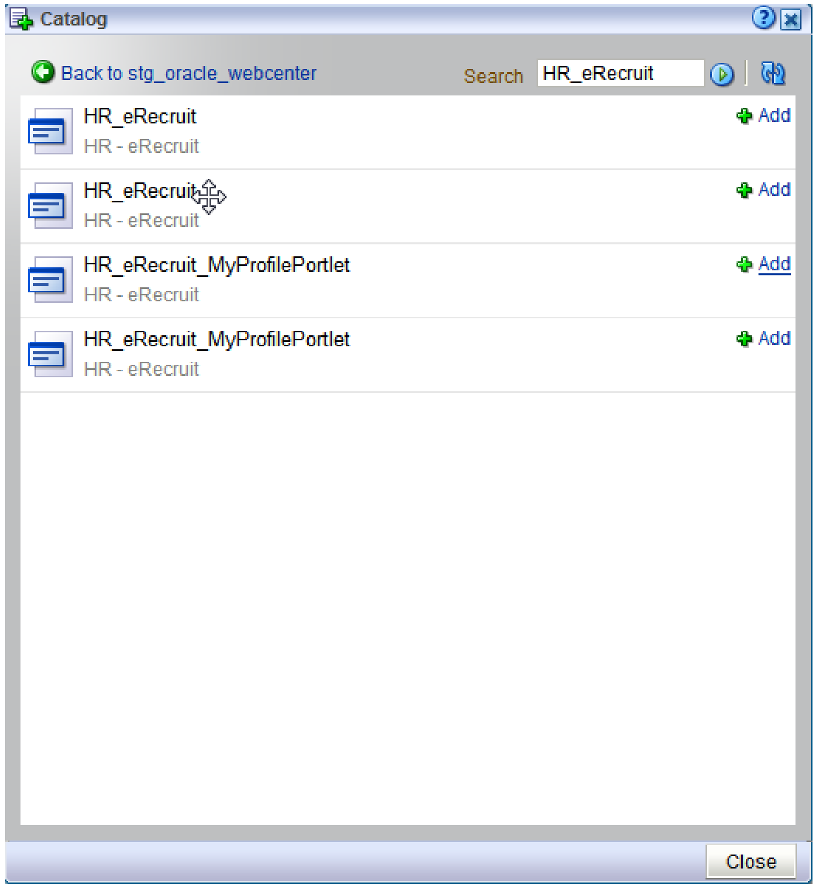
   To add the HR - My Profile portlet to the left pane search for the string *HR_MyProfile* to find the list of HR_MyProfile portlets available and add the required portlet from the list to the portal page.



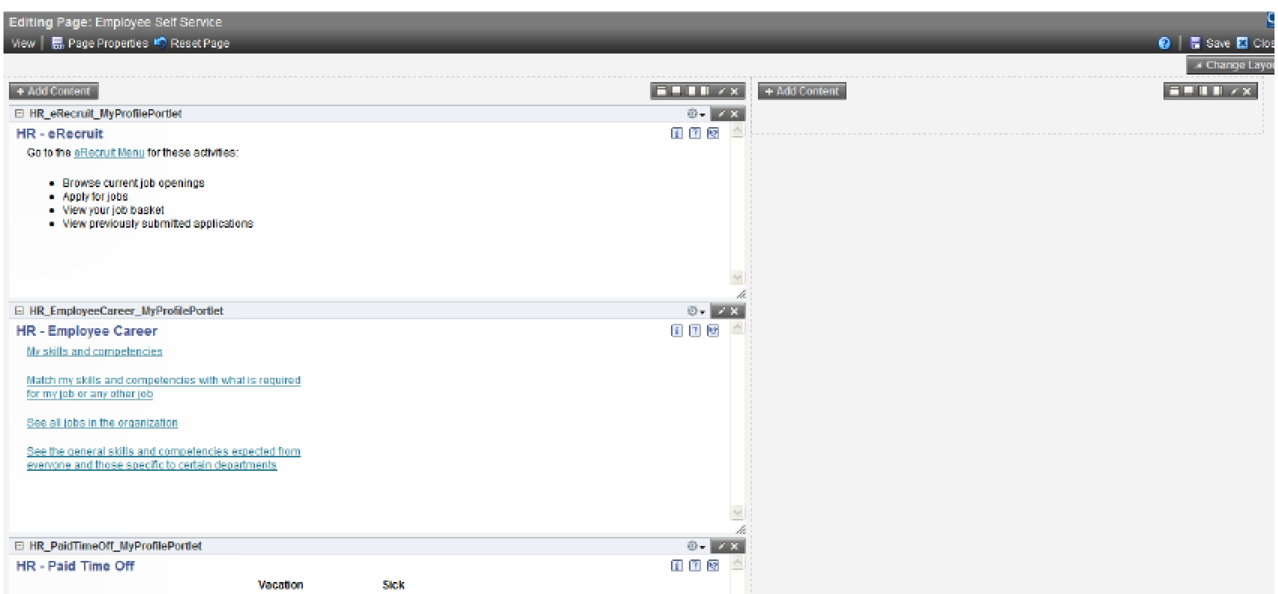
8. To add the HR - Paid Time Off portlet to the left pane search for the string *HR_Paid* to find the list of HR_PaidTimeOff portlets available and add the required portlet from the list to the portal page.



9. To add the HR - Employee Career portlet to the left pane search for the string *HR_Employee* to find the list of portlets starting with the string HR_Employee and add the required HR - Employee Career portlet from the list to the portal page.

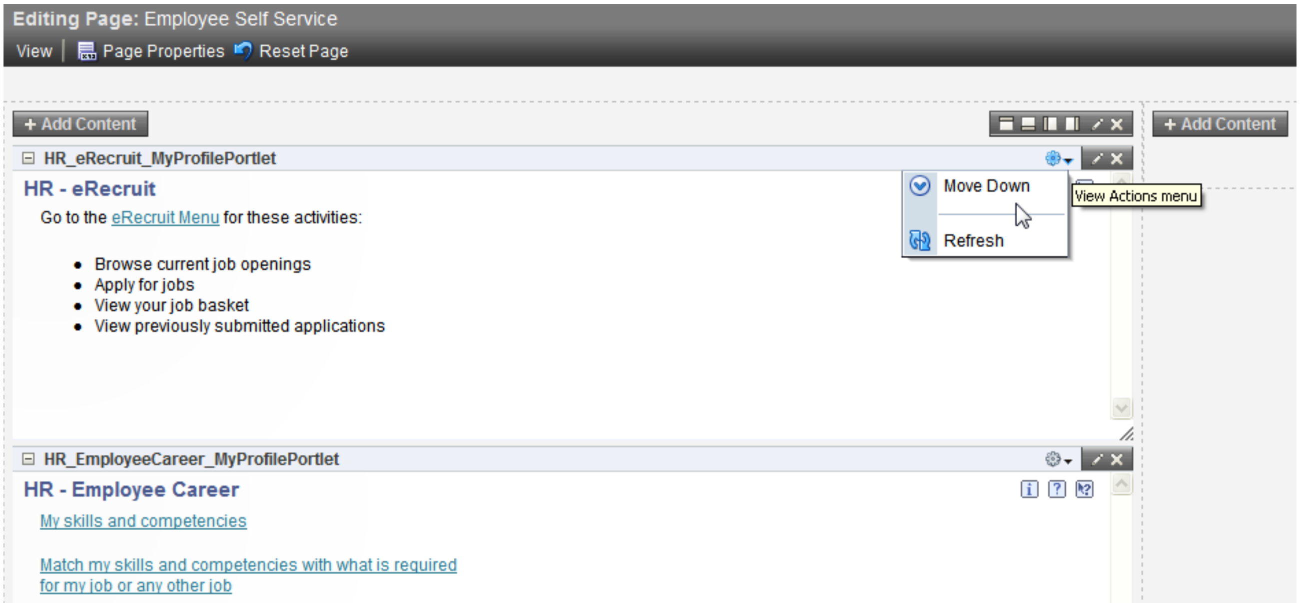


10. To add the HR - eRecruit portlet to the left pane search for the string *HR_eRecruit* to find the list of HR_eRecruit portlets available and add the required portlet from the list to the portal page.

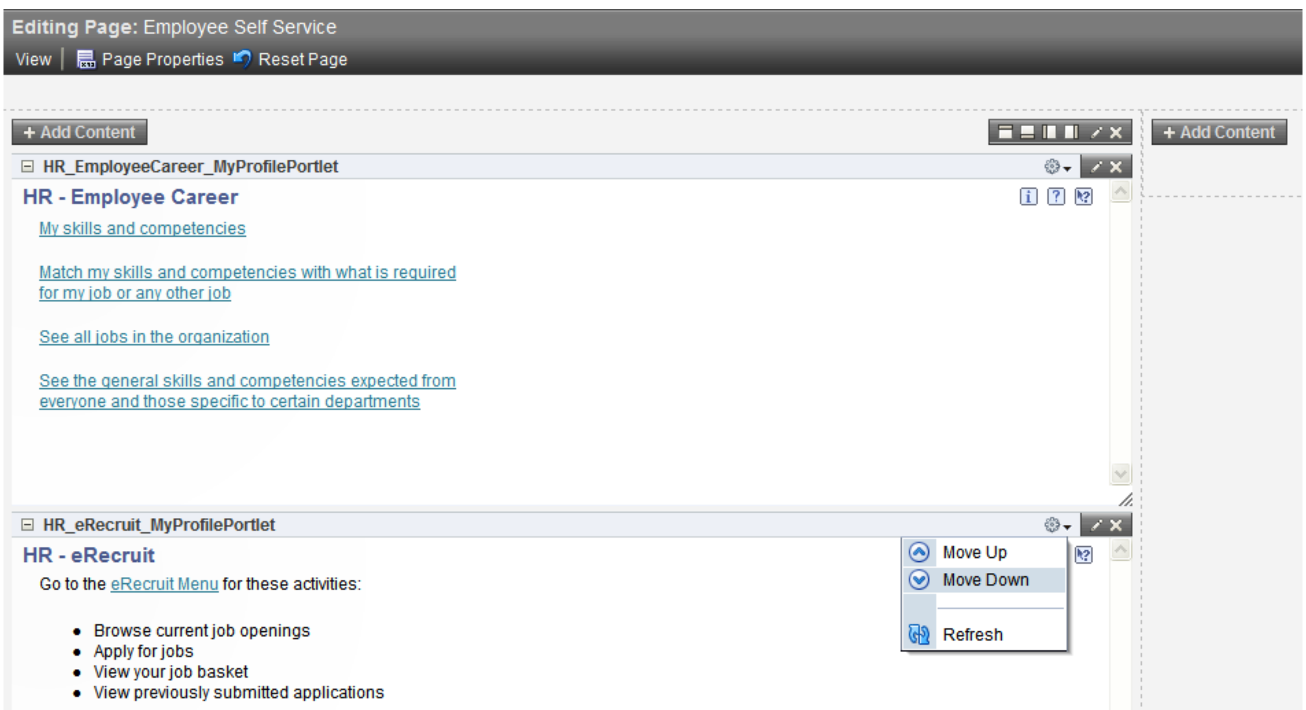


11. After adding all the required portlets to left pane click the *Close* button.

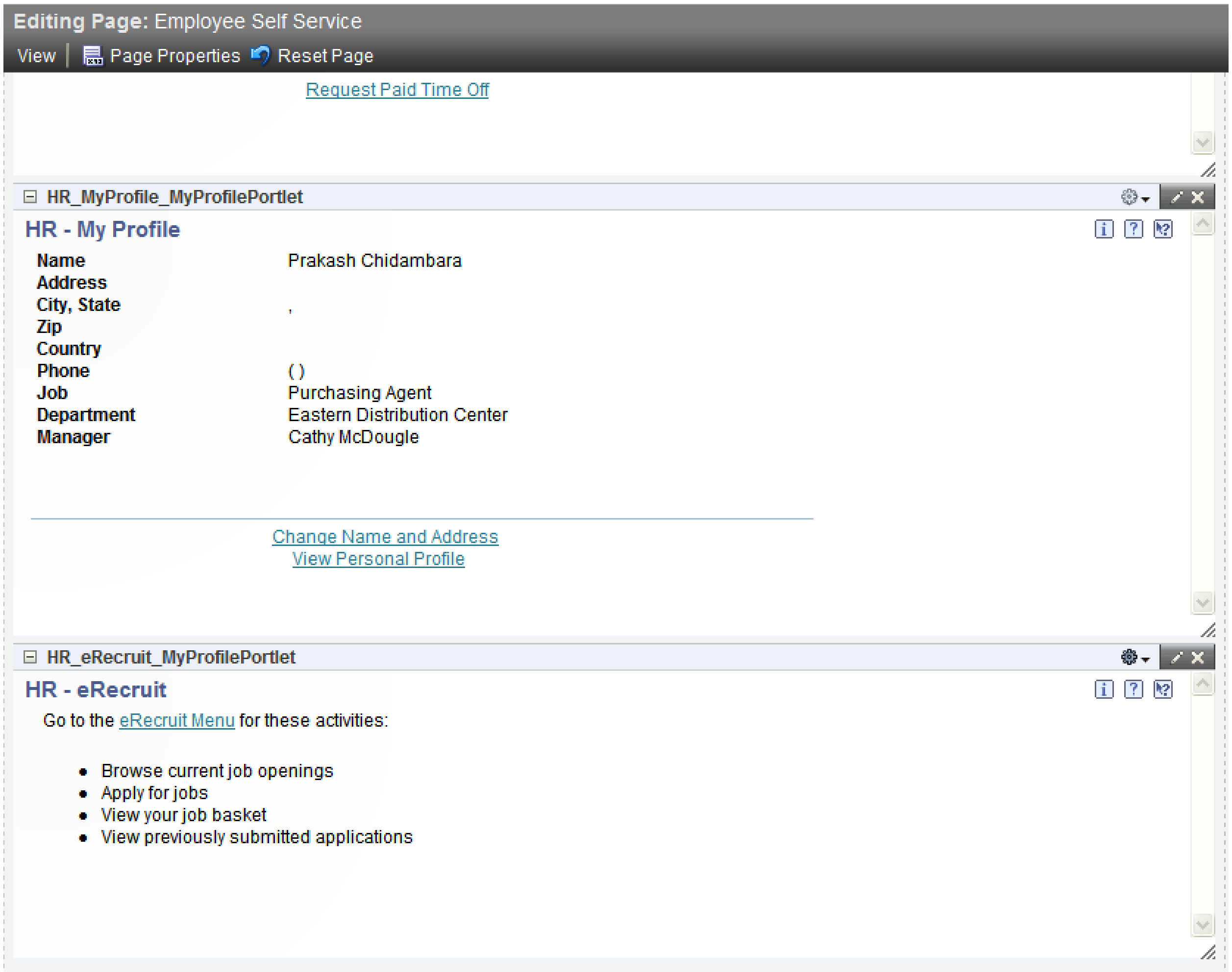
12. Notice that the portlets are arranged on the left pane of the portal page in reverse order. We can move the portlets up or down so that the portlets are arranged as given in the sample portal page. Follow the steps below to move the portlets.



a. All of the portlets on WebCenter have the Action menu which has the menu item to move up/down and to refresh. Since the HR - eRecruit portlet has to be at the bottom of the left pane, click on the *Move Down* menu action.



b. Continue to move the HR_eRecruit portlet down until it reaches the bottom on the left pane.



c. Similarly arrange the positions of other portlets by moving up or down as required.

Note: The portlets can also be arranged by drag and drop.

---

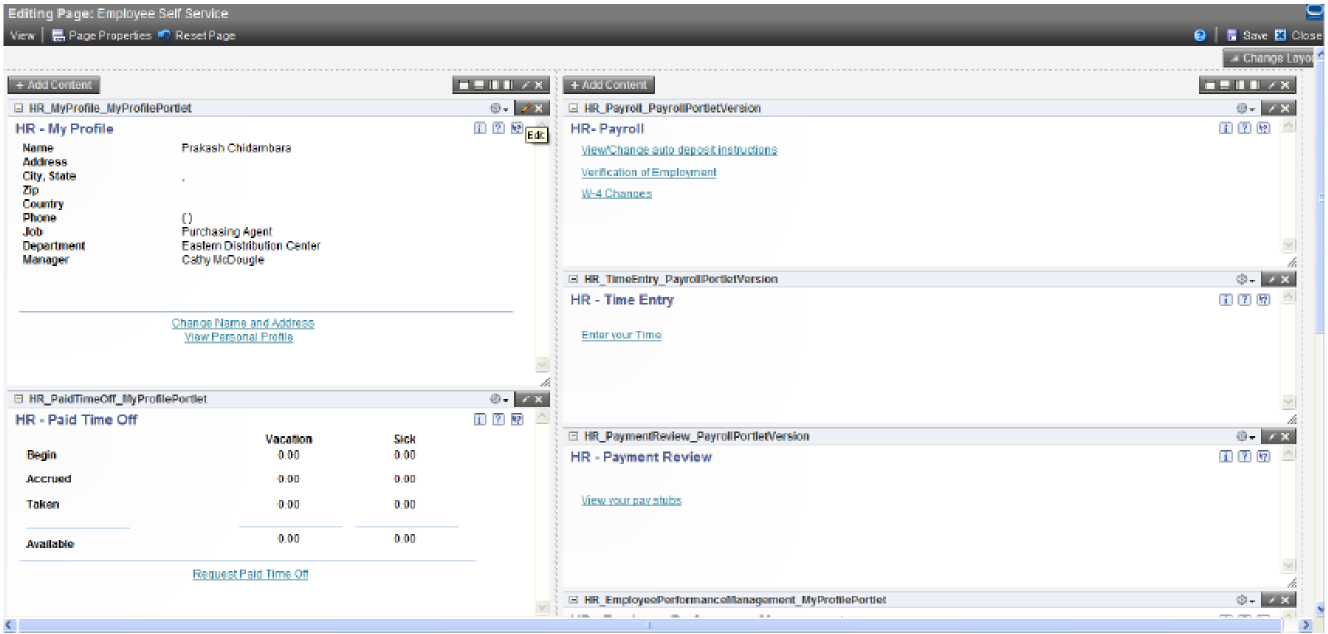
13. The following portlets need to be added to the Right pane in the order given below:

- HR_Payroll
- HR_TimeEntry
- HR_Payment Review
- HR Employee Performance Management
- HR Enhance Employee Self Service

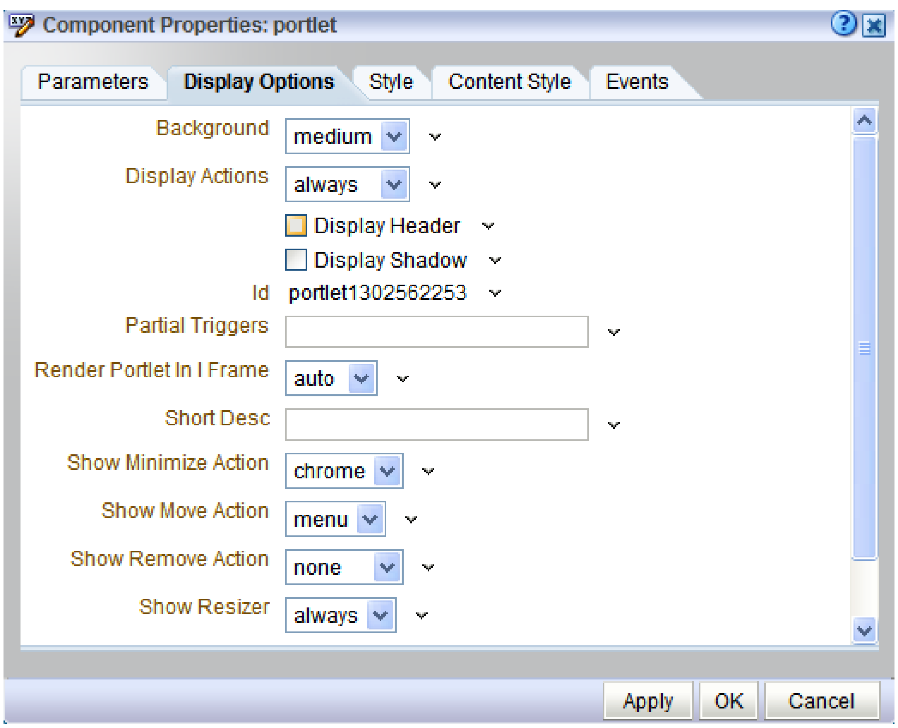
Note: To avoid re-arranging the portlets on the right pane, add the portlets to the right pane in the reverse order starting with HR - Enhance Employee Self Service.

8.5.1 Removing the Portlet Header

To remove the Portlet header:



1. Click the *Edit* button on portlet.

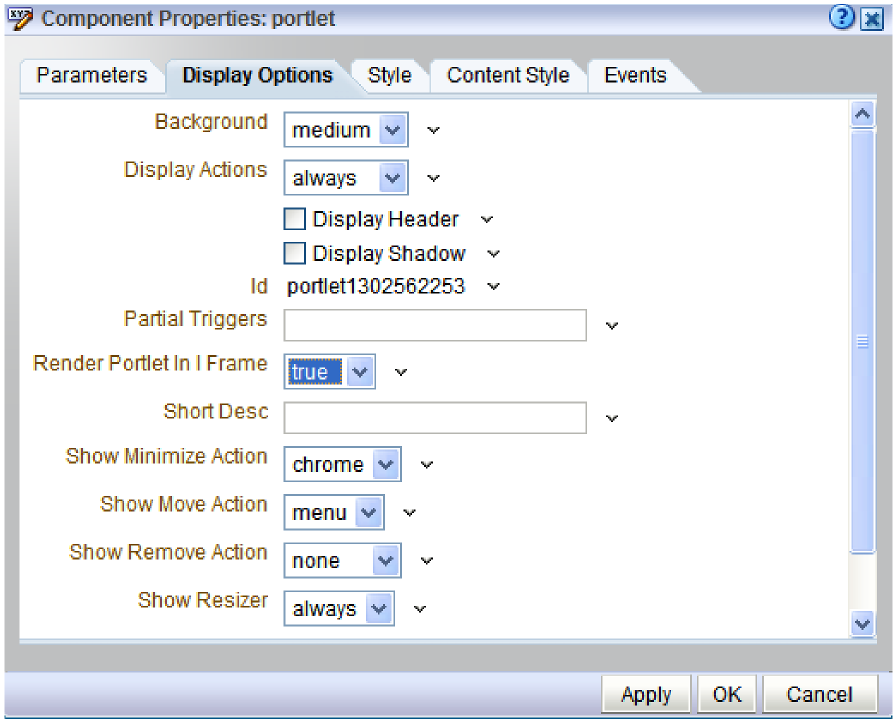


2. Select the *Display Options* tab and then uncheck *Display Header*.

8.5.2 Required WebCenter EnterpriseOne Portlets Setup

For EnterpriseOne portlets to work on WebCenter, the property *Render Portlet in I Frame* which is available on the *Display Options* of Component properties should be set to true. To set the property click on the edit button of the portlet and select the *Display*

Options tab. Set the property *Render Portlet in I Frame* to true as shown in the image below.

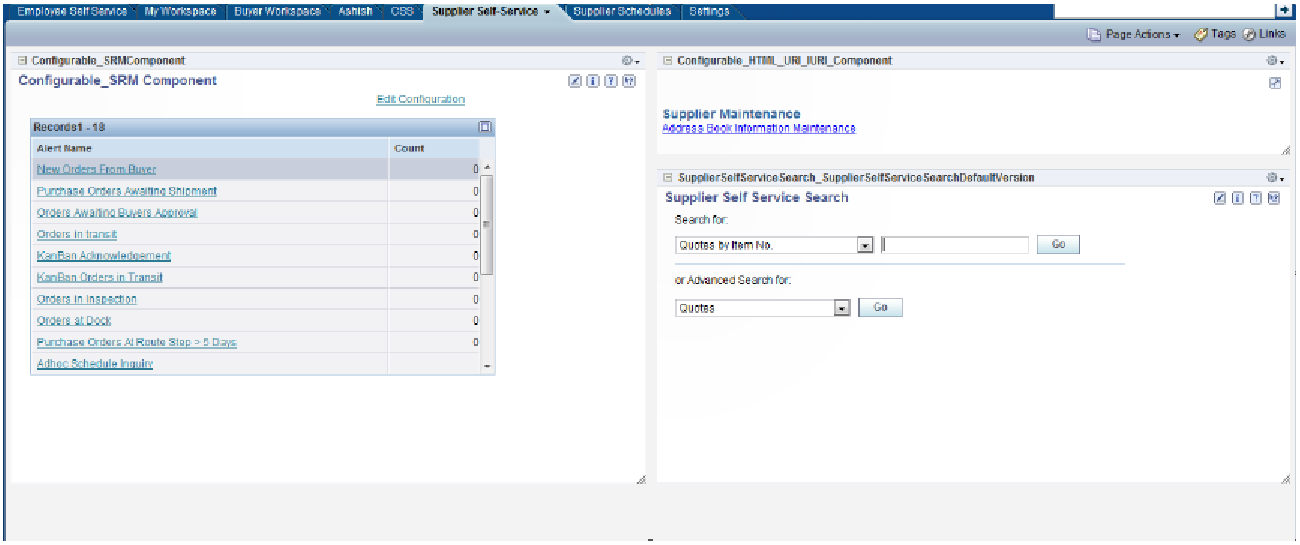


8.6 Creating a Supplier Self-Service Portal Page

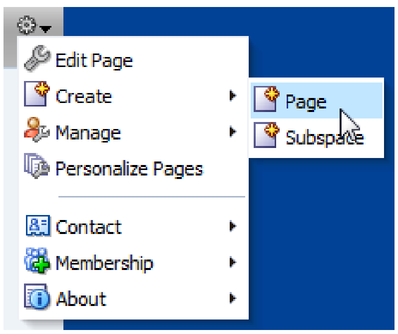
WebCenter Spaces also provide a variety of page layouts (called styles) that can used to create different types of pages with different layouts. Page types may restrict the type of content that can be added to a page, such as text only, wiki only, blog only, and the like. Page layouts define the number of columns and content areas that define a page's geometry. Layouts are initially determined by the style that is selected while creating the page. Some page styles inherently allow switching to another page layout, such as wikis or blogs.

In addition to the layouts available through page styles, the user can create their own layouts using the layout components available through the Resource Catalog.

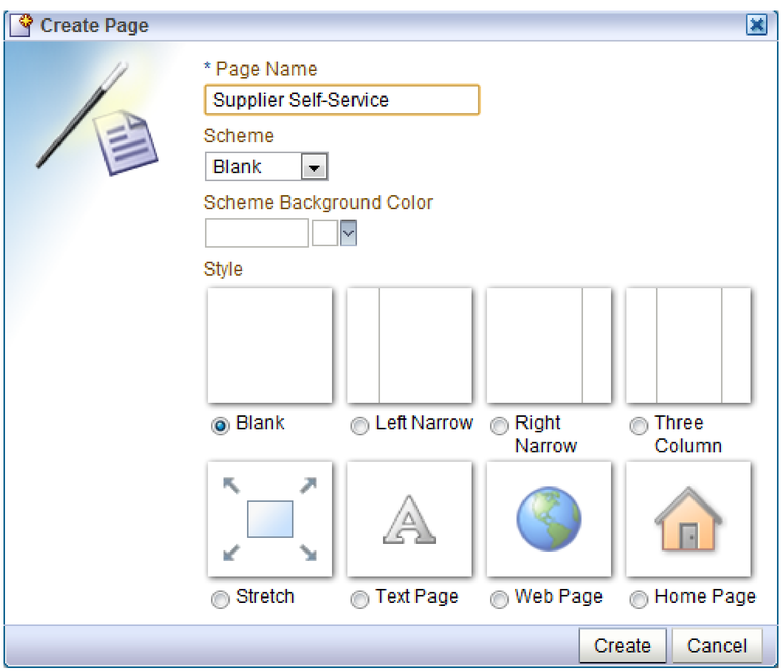
The following image represents the Supplier Self-Service portal page:



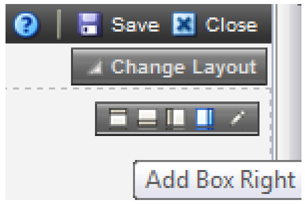
Follow these steps to create the Supplier Self-Service page:



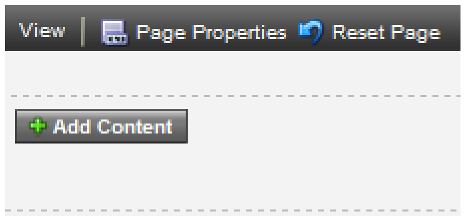
1. Click the Page Actions dropdown arrow, then select Create, and then Page.



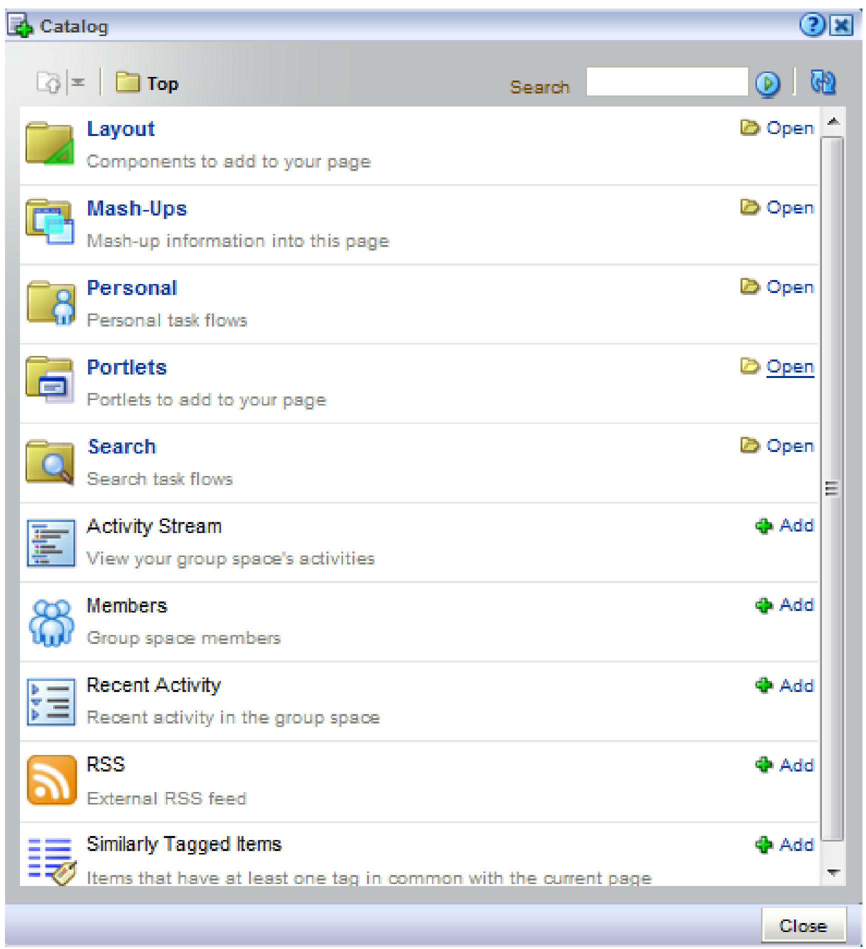
2. Enter the Page Name as *Supplier Self-Service* and let the Scheme be Blank and click Create button. This will show Supplier Self-Service page in Edit mode having only one column.



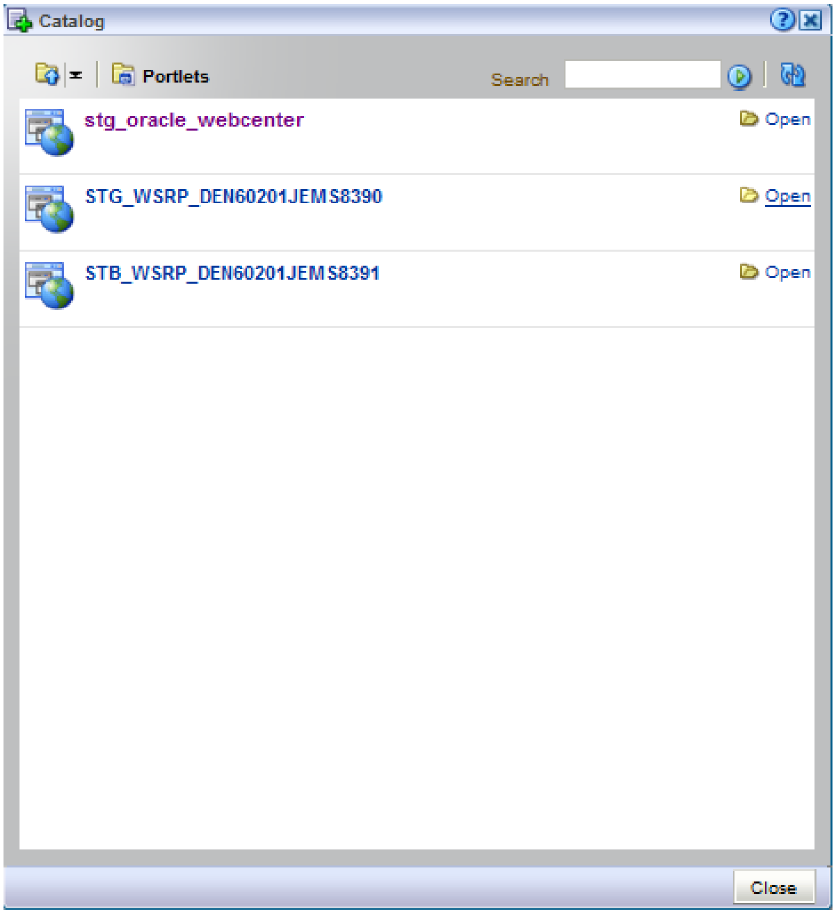
3. Click on *Add Box Right*.



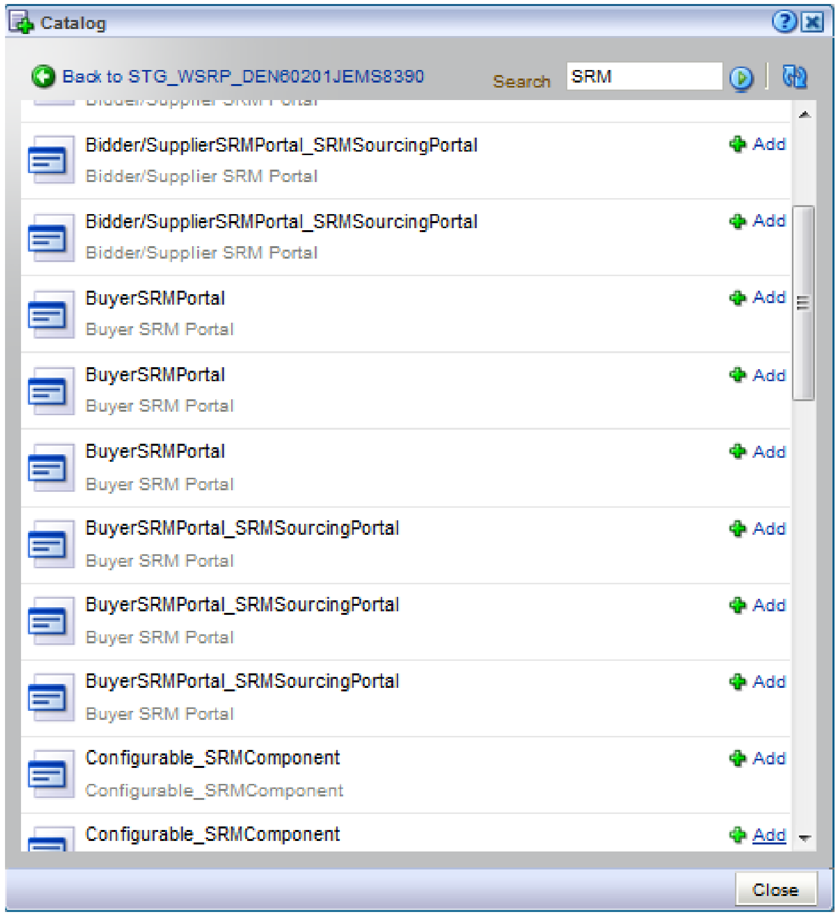
4. Click *Add Content* to add E1 portlets.



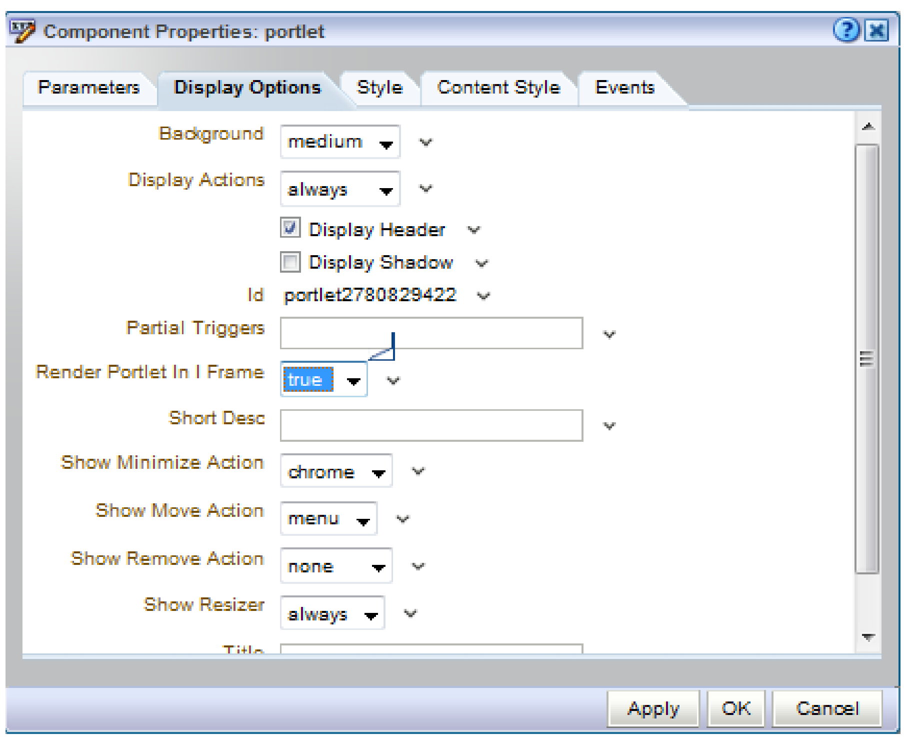
5. Open the *Portlets* catalog.



6. Select *STG_WSRP_DEN60201JEMS8390* (this name could be different based on the setup) to see the list of EnterpriseOne portlets available.

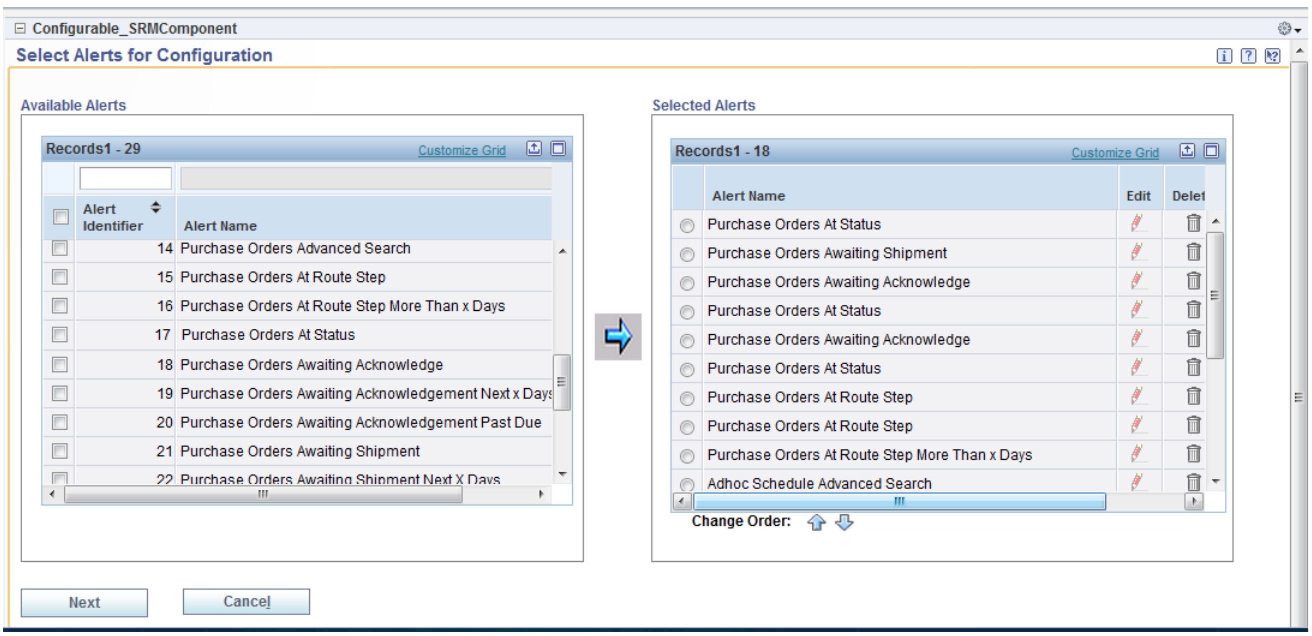


7. Add the Configurable_SRM Component portlet from the list of portlets available.

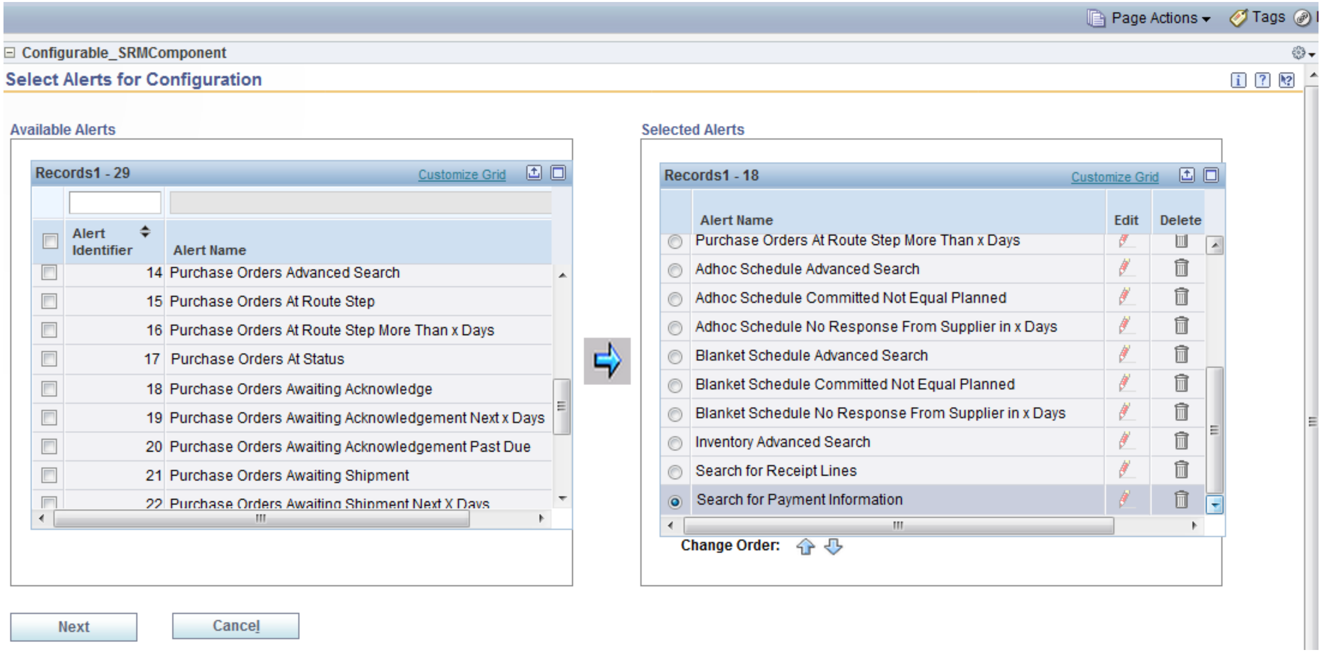


8. Click on the edit button of the portlet and select the *Display Options* tab. Set the property *Render Portlet in I Frame* to true.

9. Save and close the page. Click on *Edit Configuration* link.



10. Add the alerts as shown in the image using the arrow to move them from the Available Alerts grid to the Selected Alerts grid.



11. Click on *Next*. This will allow the user to override all the alert names as desired.

    The images below list the alert name overrides:

Figure 8–13 Purchase Orders At Status Alert

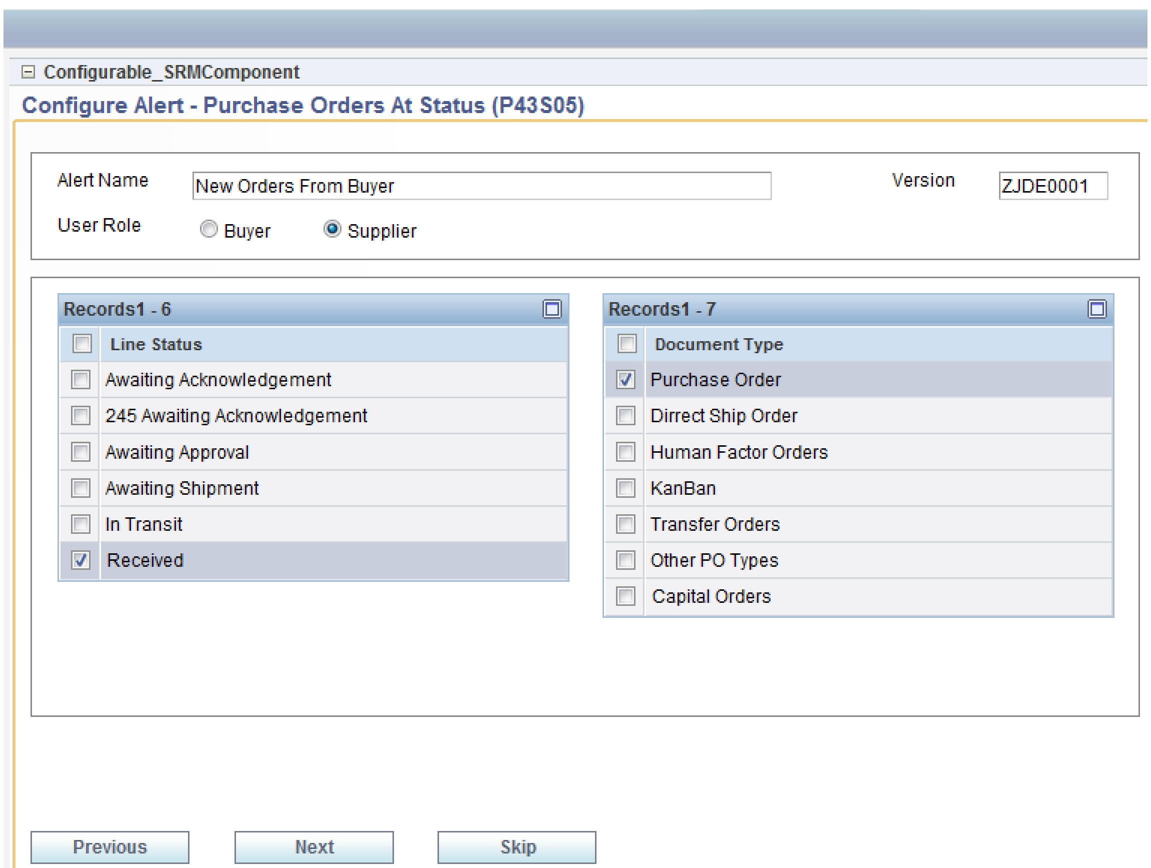


Figure 8–14 Purchase Orders Awaiting Shipment Alert

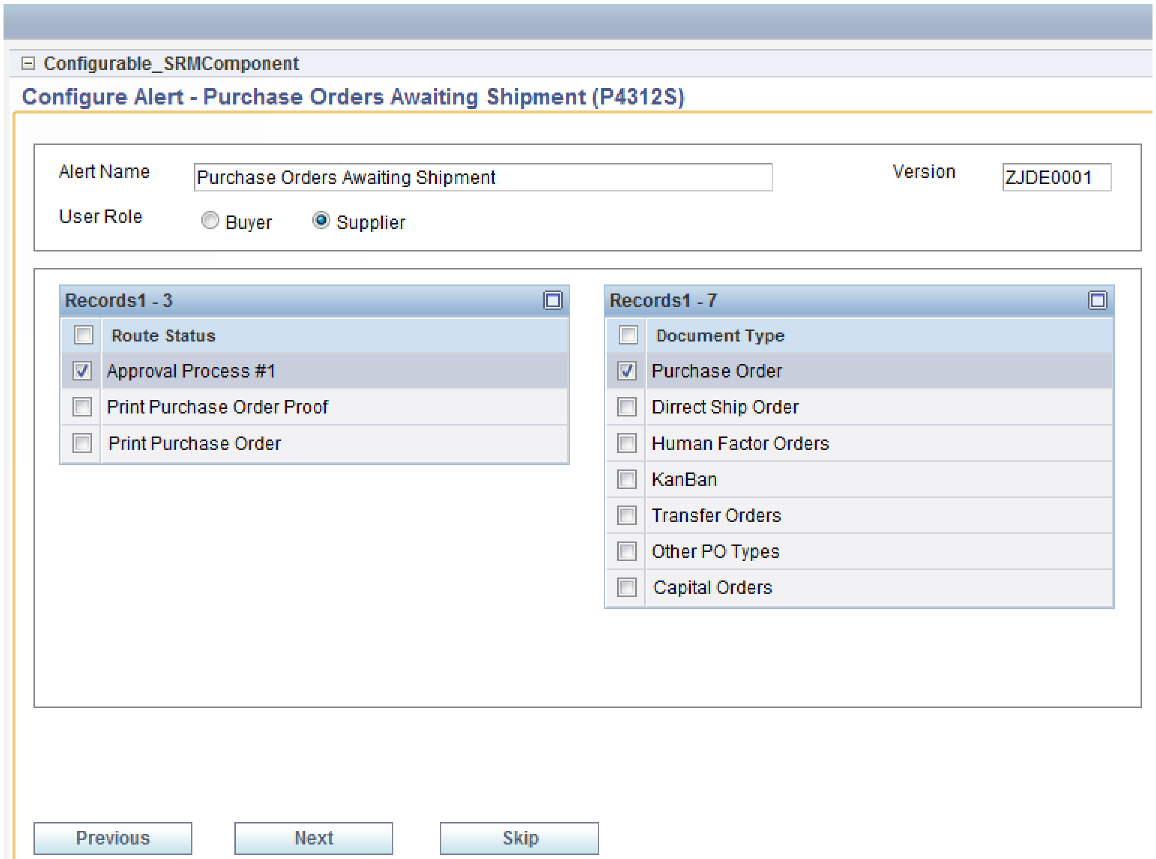


Figure 8–15 Purchase Orders Awaiting Acknowledge Alert

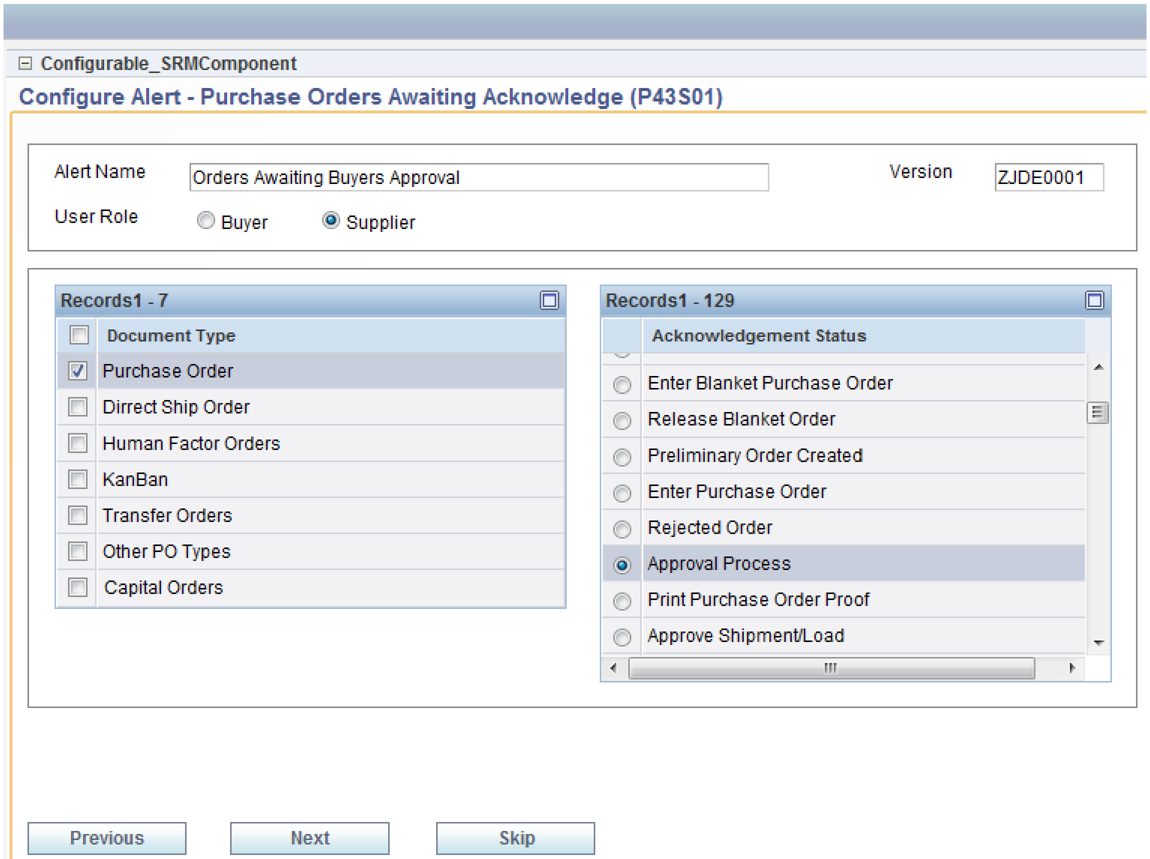


Figure 8–16 Purchase Orders At Status Alert

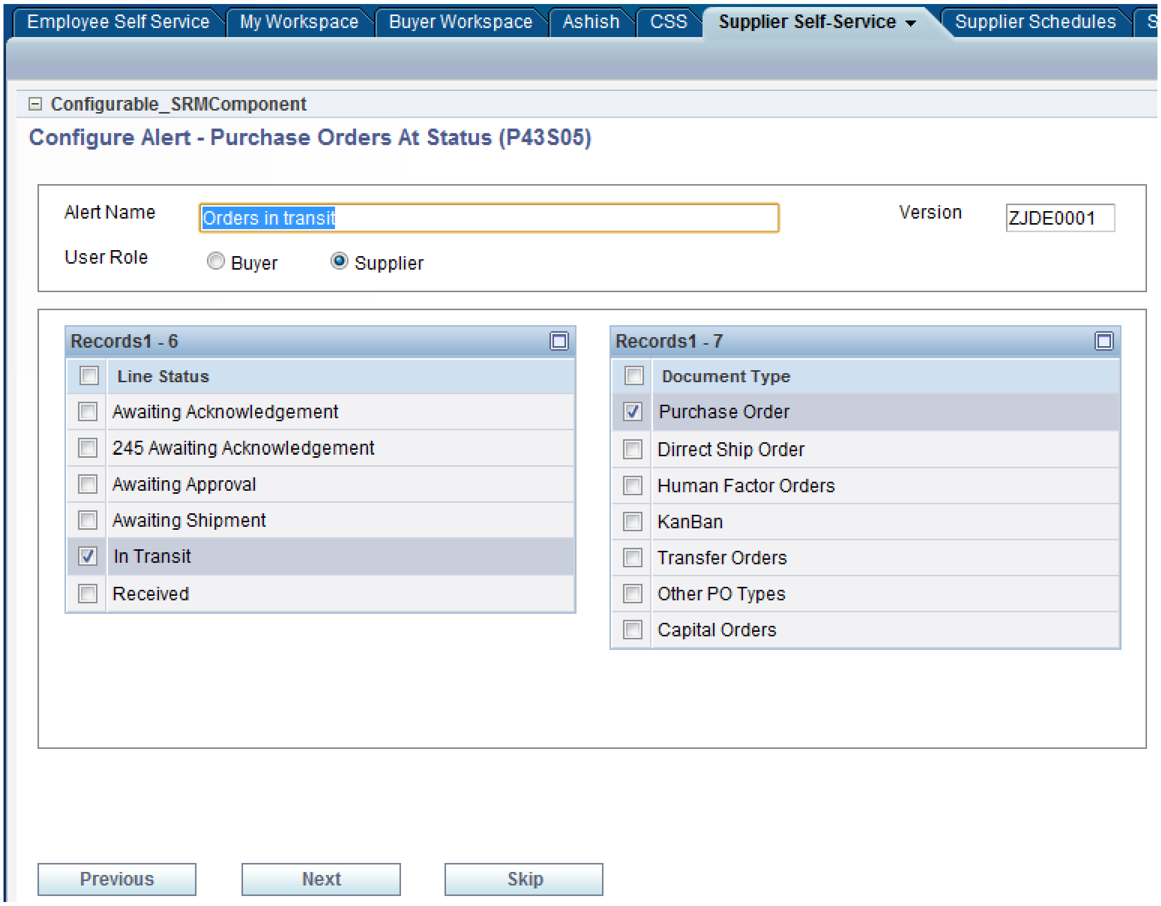


Figure 8–17 Purchase Orders Awaiting Acknowledge Alert

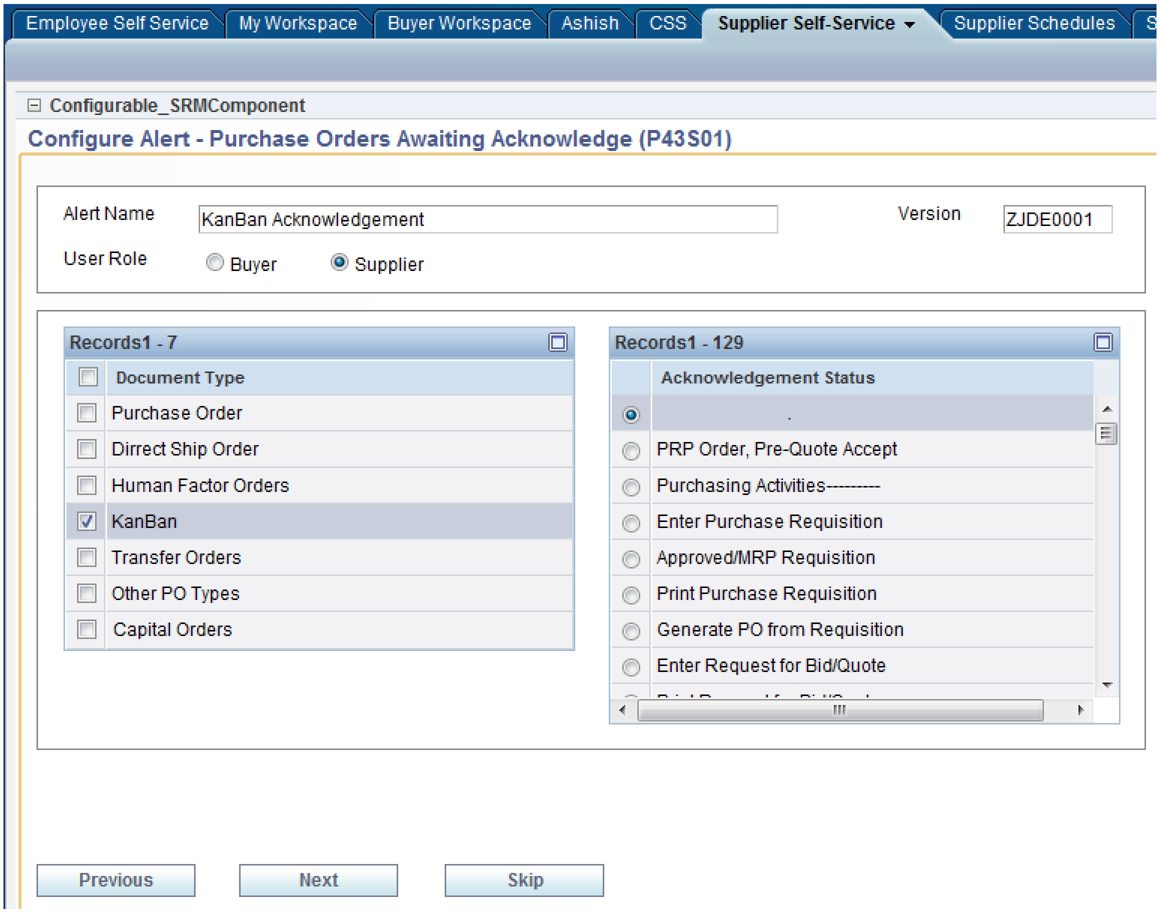


Figure 8–18 Purchase Orders At Status Alert

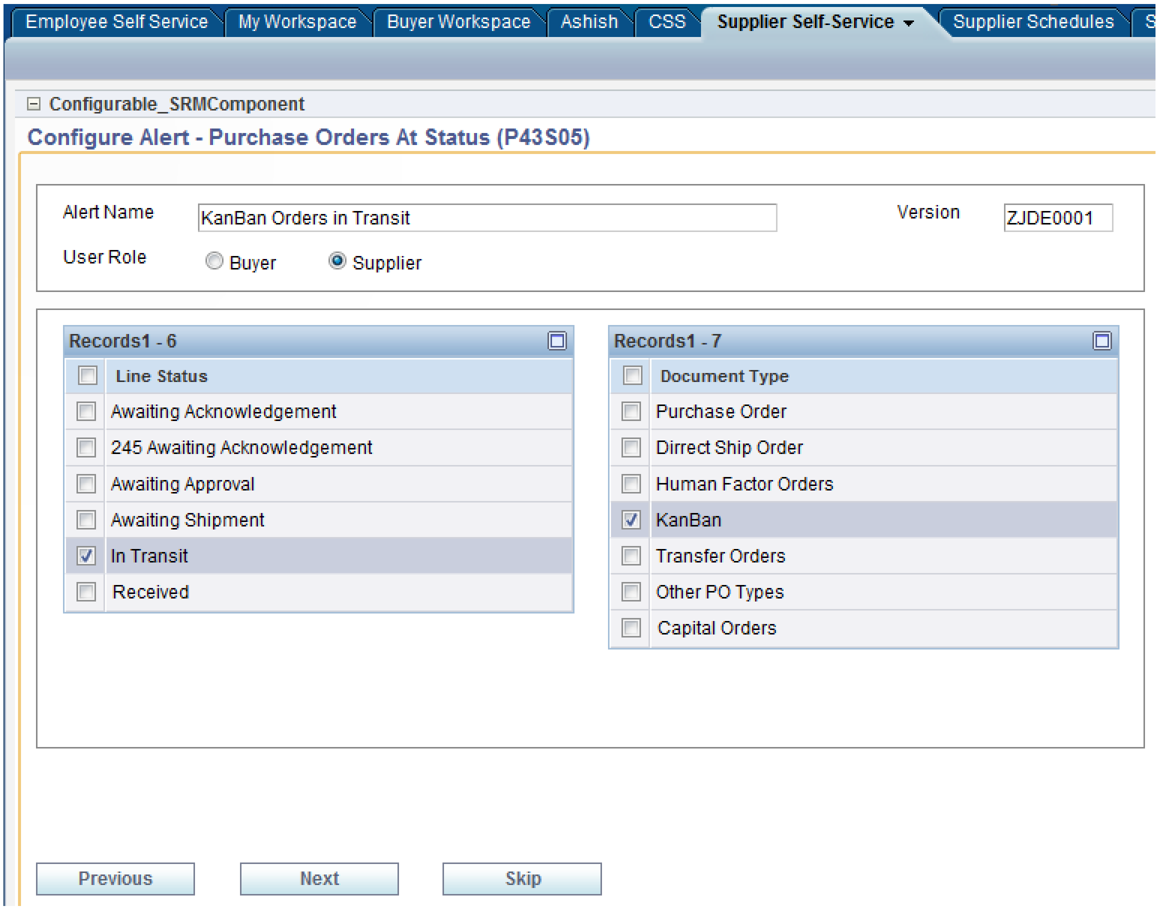


Figure 8–19 Purchase Orders At Route Step - Orders in Inspection Alert

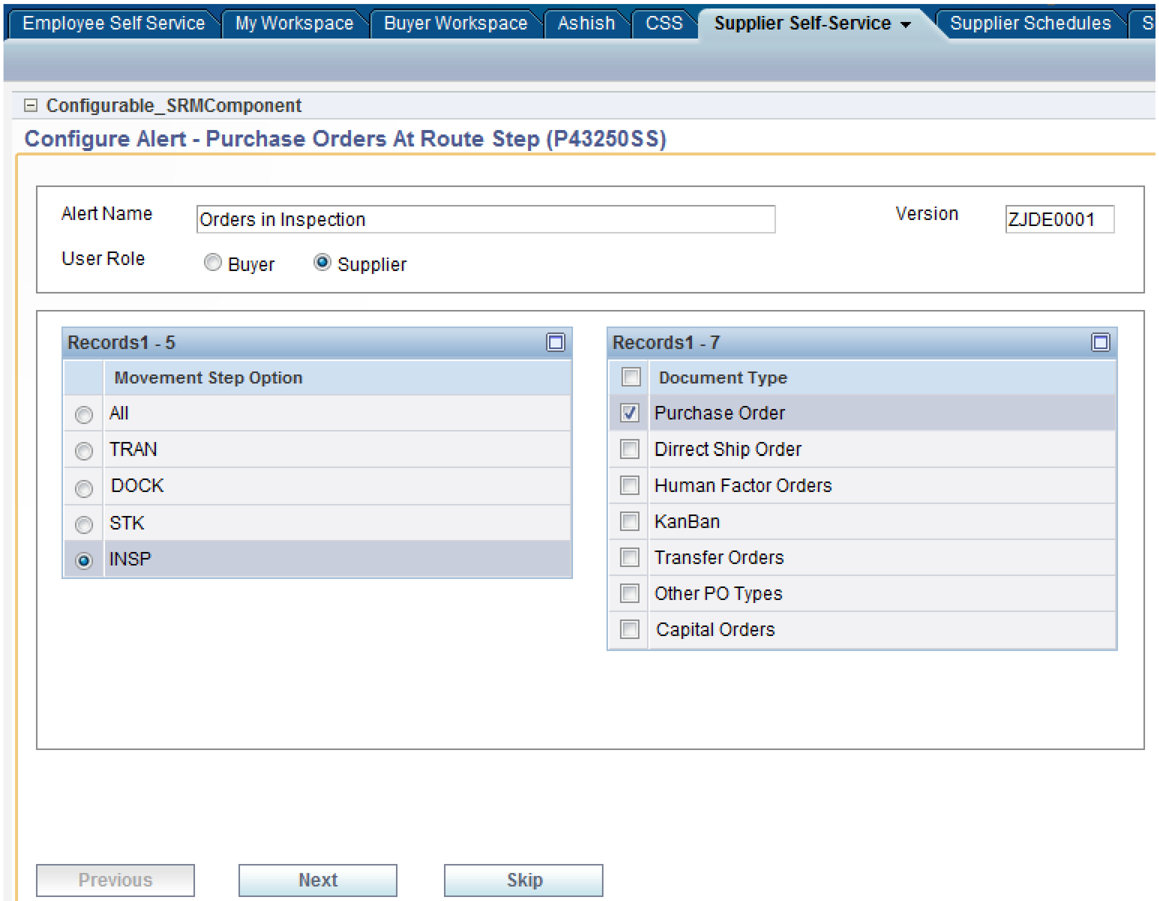


Figure 8–20 Purchase Orders at Route Step - Orders at Dock Alert

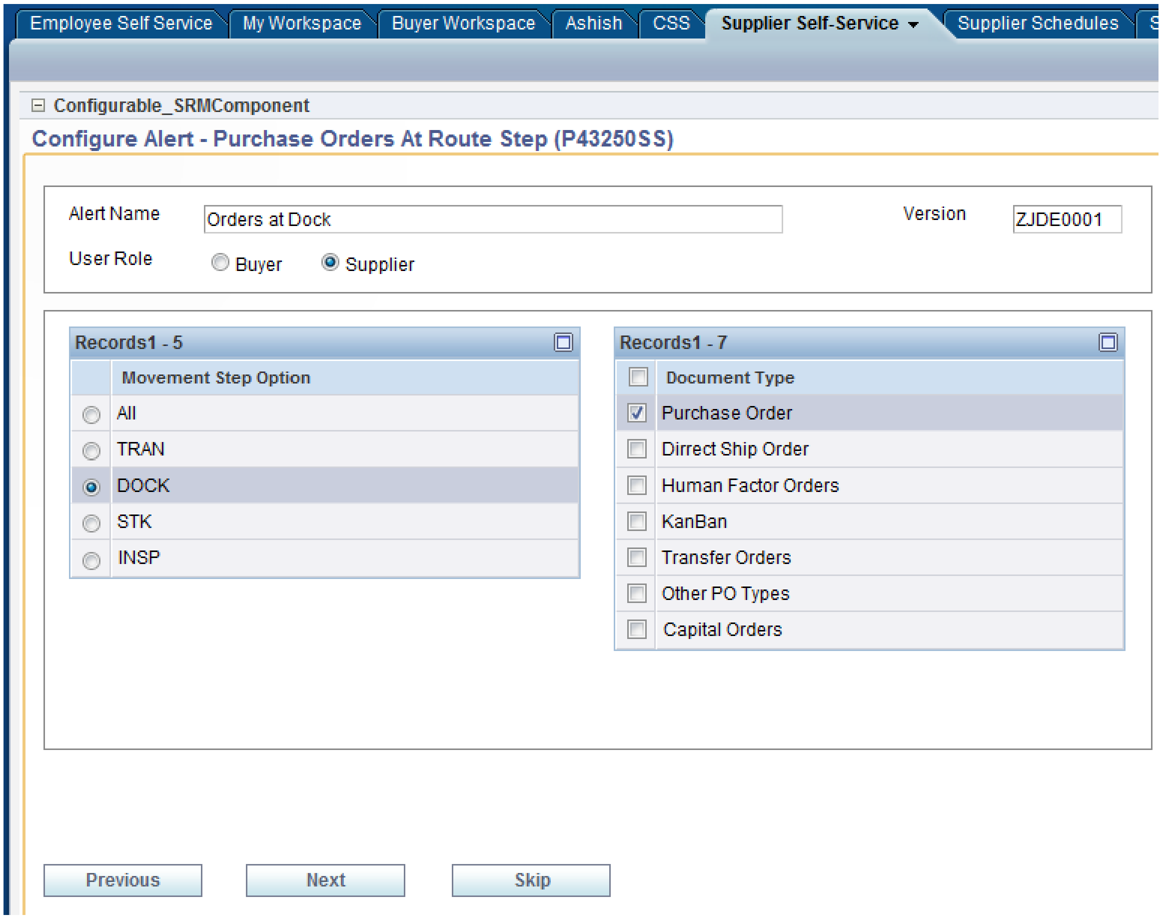


Figure 8–21 Purchase Orders At Route Step More Than X Days

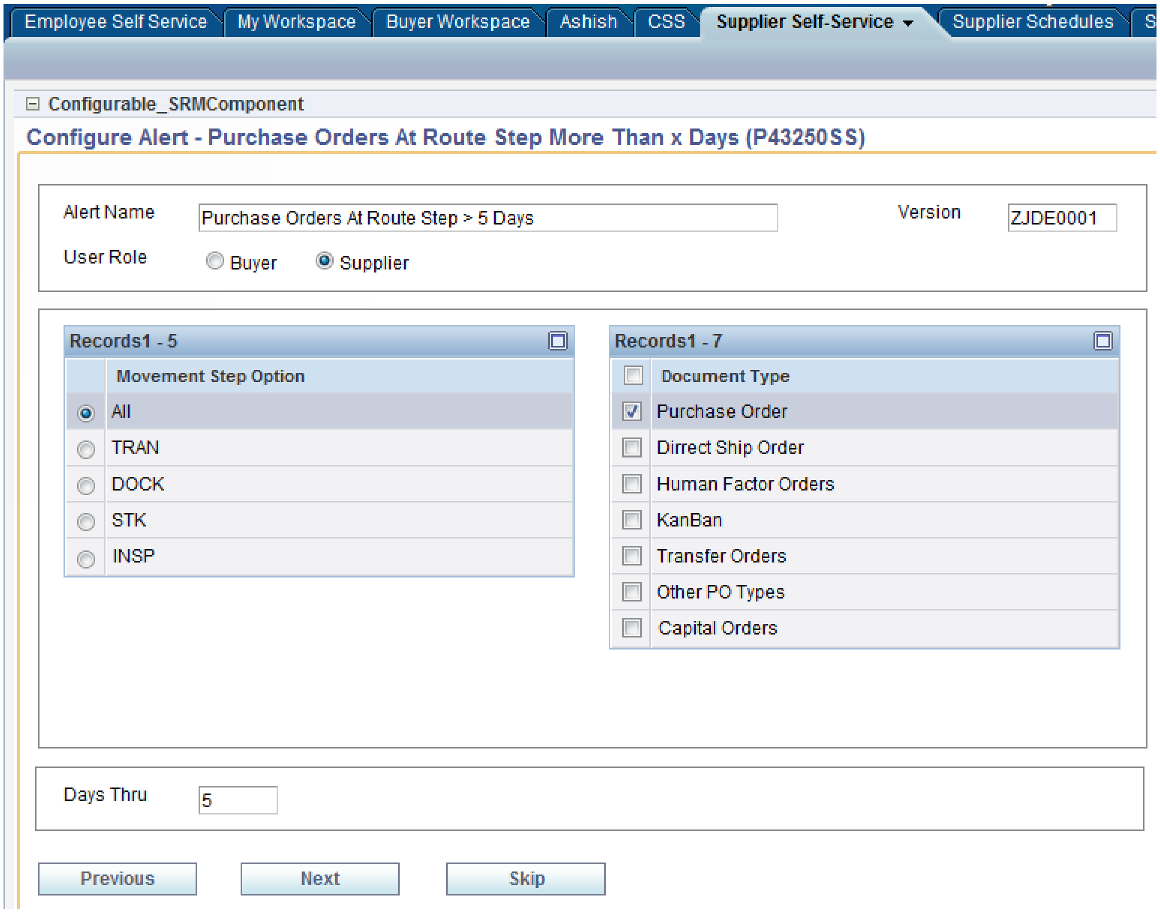


Figure 8–22 Adhoc Schedule Advanced Inquiry

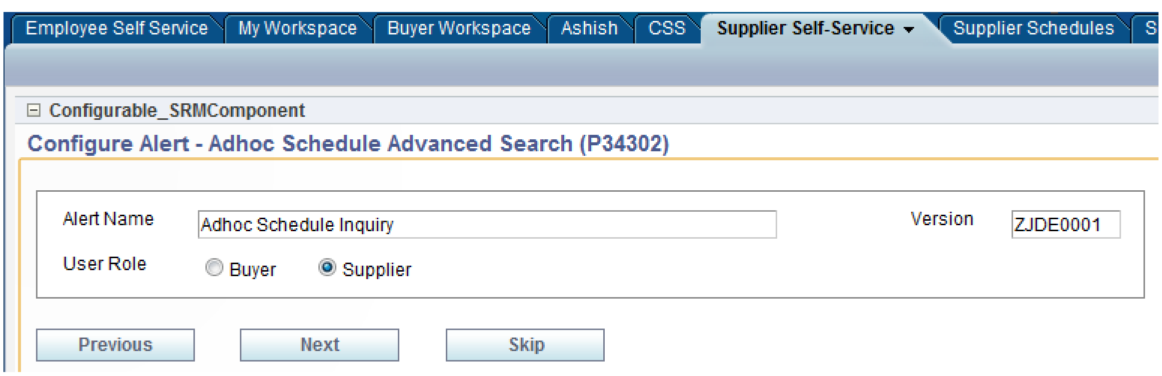


Figure 8–23 Adhoc Schedule Committed Not Equal Planned Alert

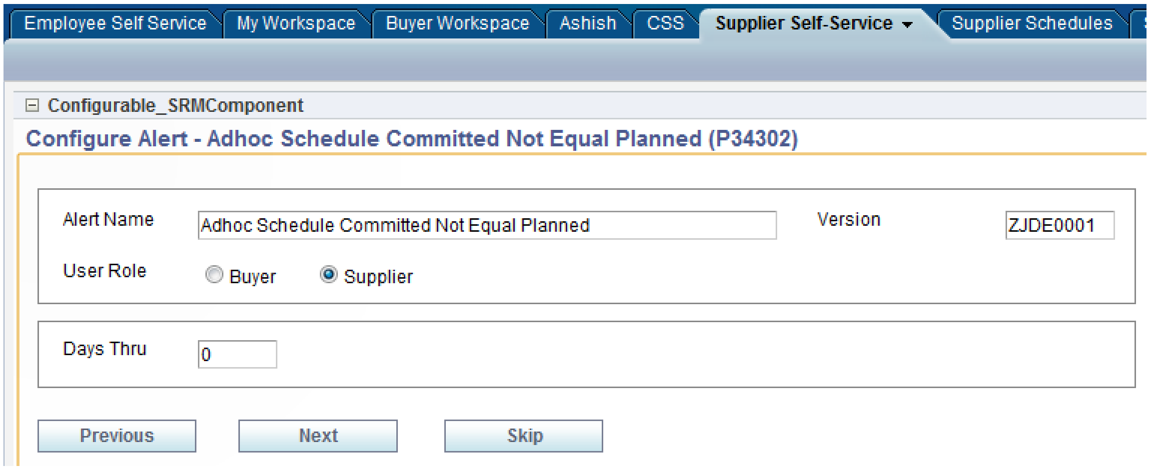


Figure 8–24 Adhoc Schedule No Response From Supplier in X Days Alert

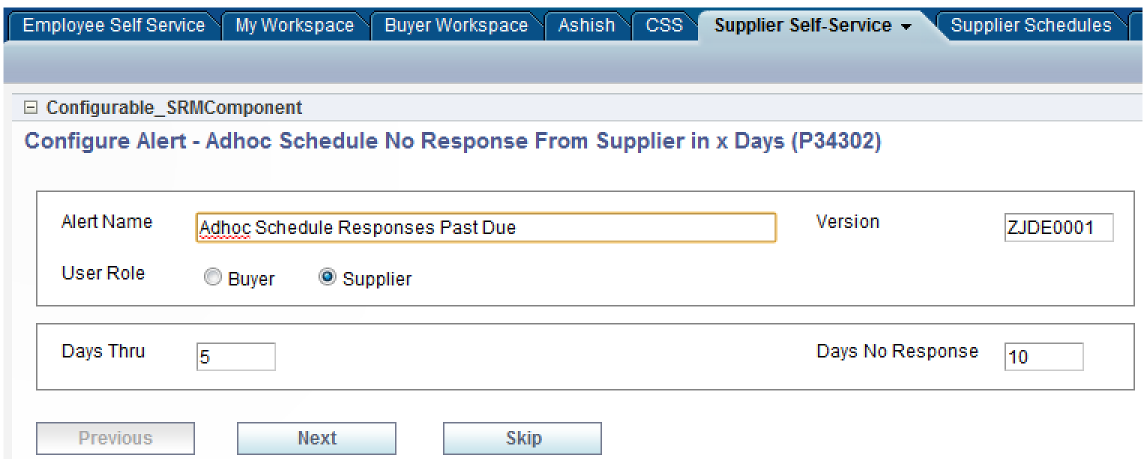


Figure 8–25 Blanket Schedule Advanced Search Alert

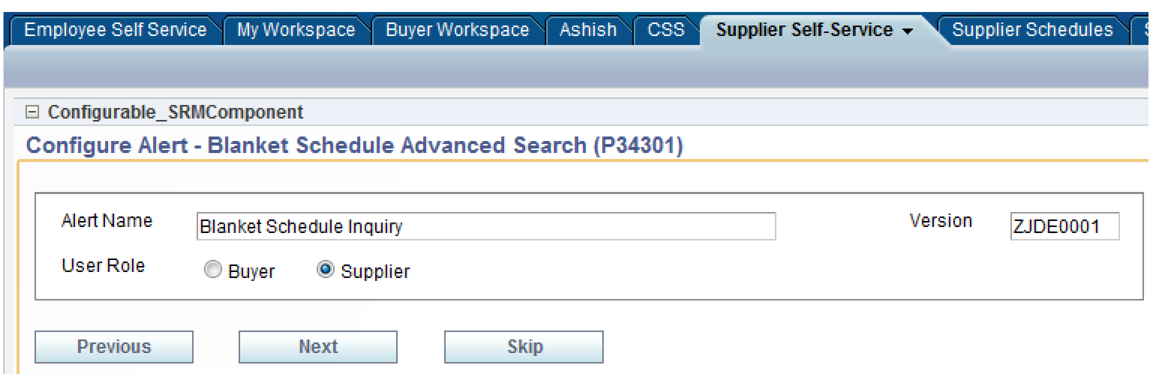


Figure 8–26 Blanket Schedule Committed Not Equal Planned Alert

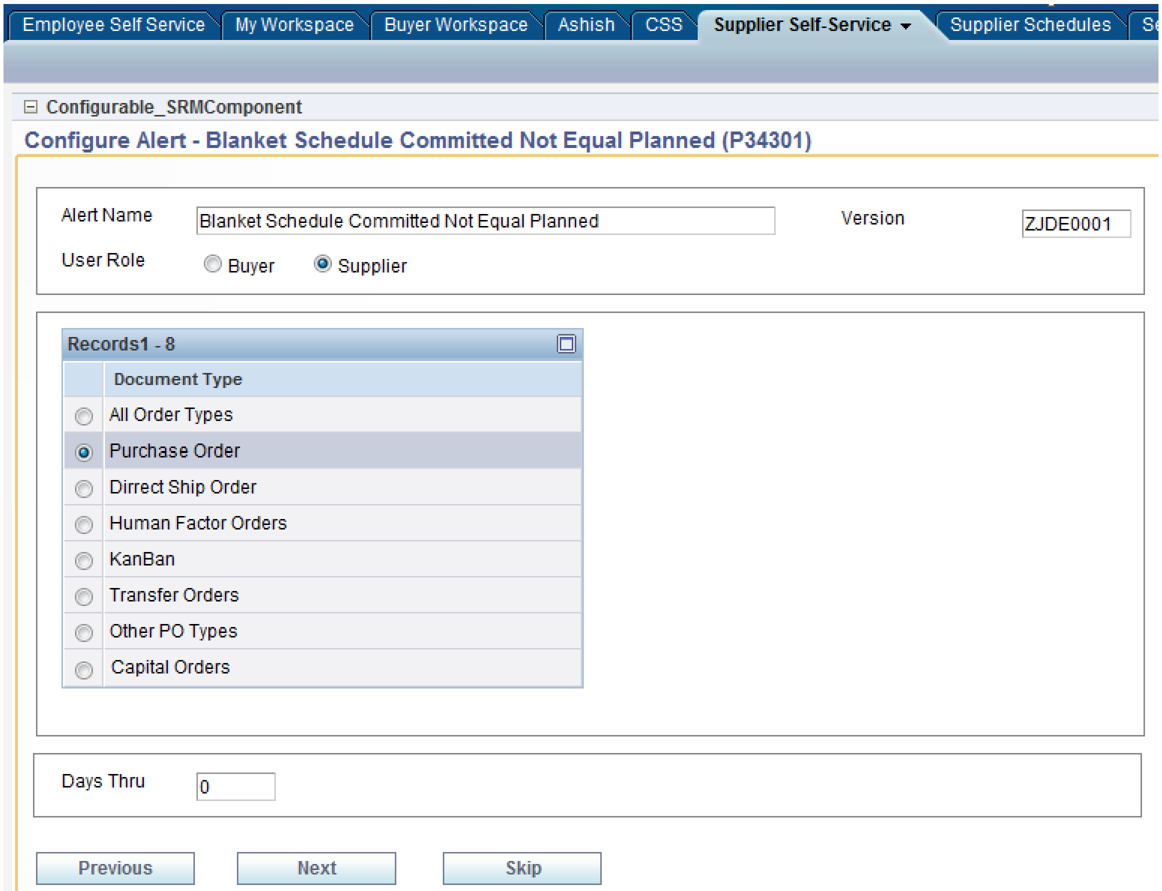


Figure 8–27 Blanket Schedule No Response From Supplier in X Days

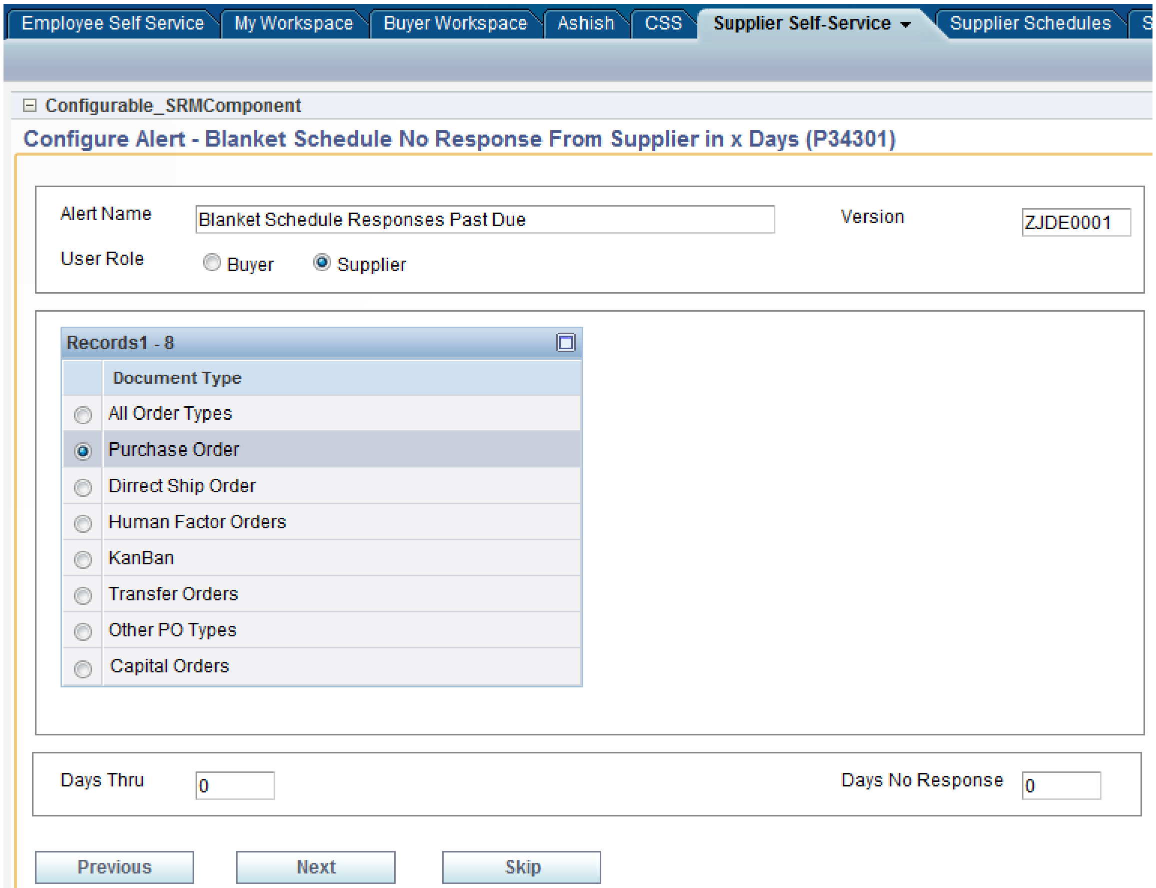


Figure 8–28 Inventory Advanced Search Alert

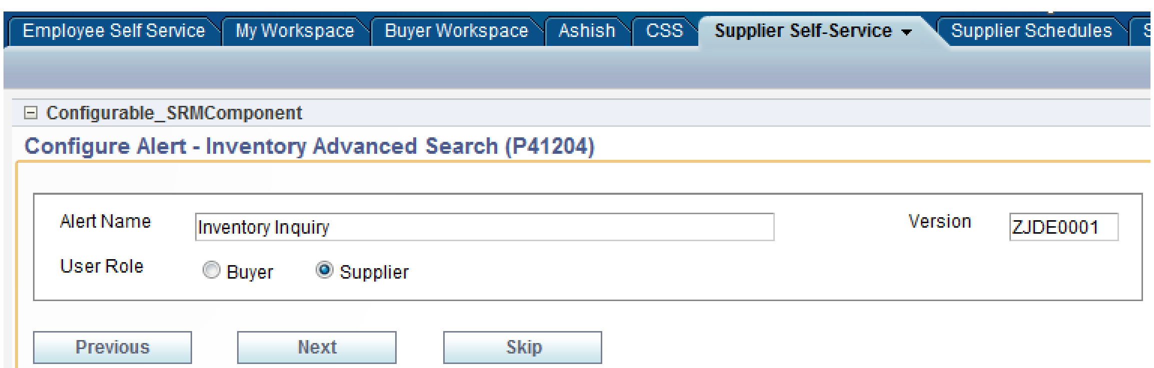


Figure 8–29 Search for Receipt Lines Alert

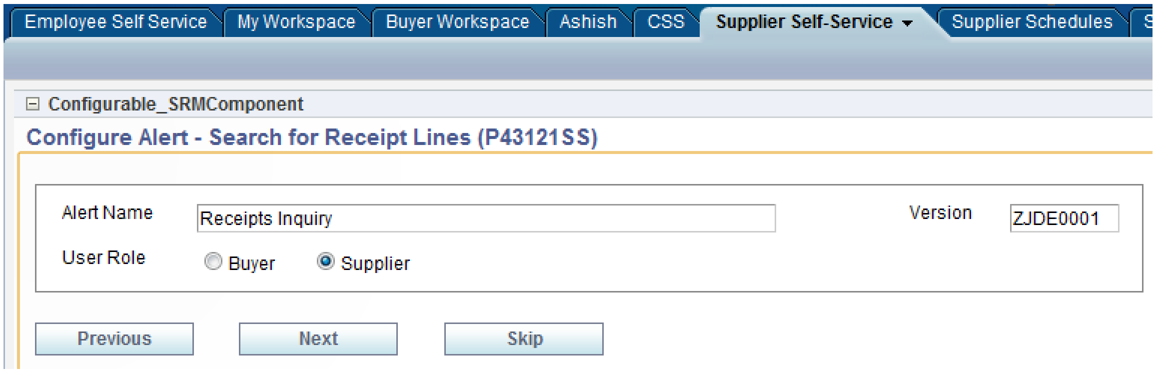
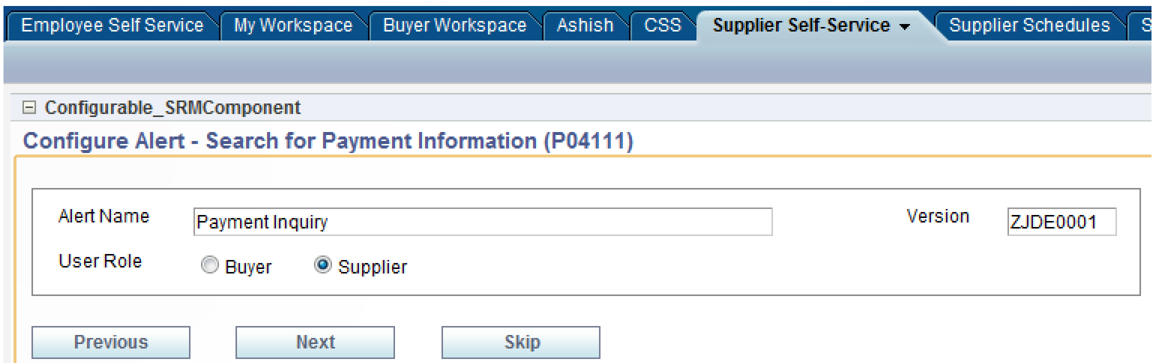
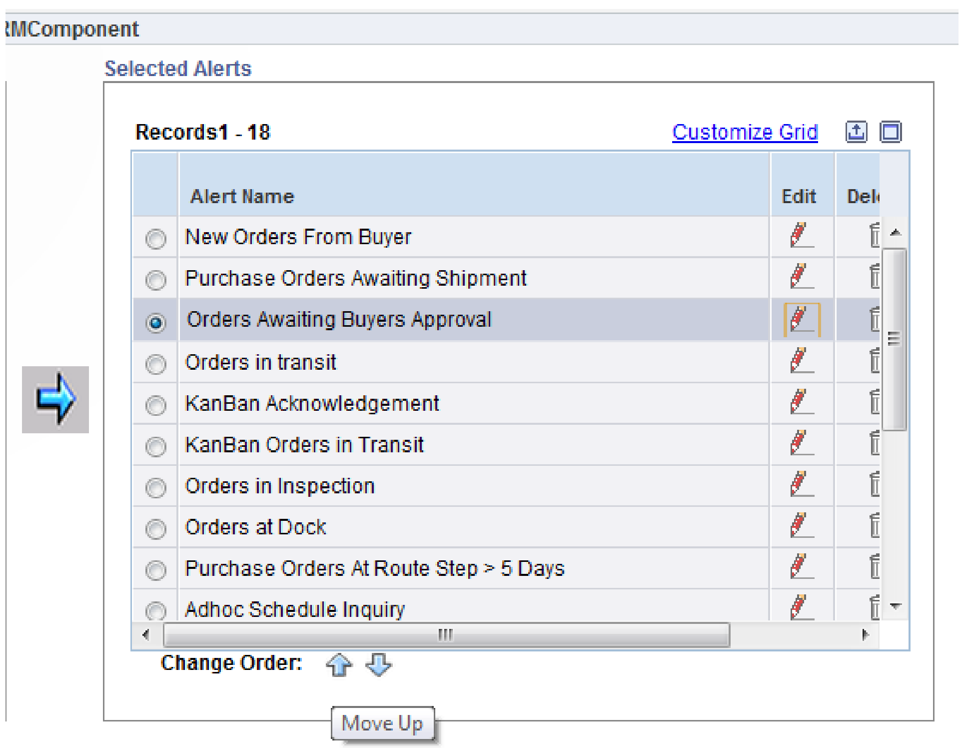
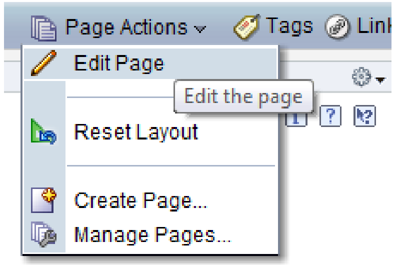


Figure 8–30 Search for Payment Information Alert

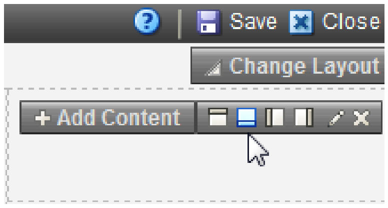




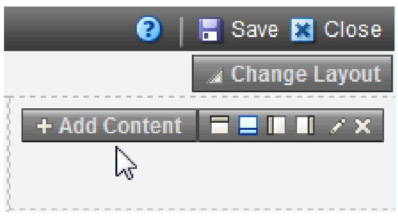
12. User can change the order in which alerts are displayed using the Move Up or Move Down icons.



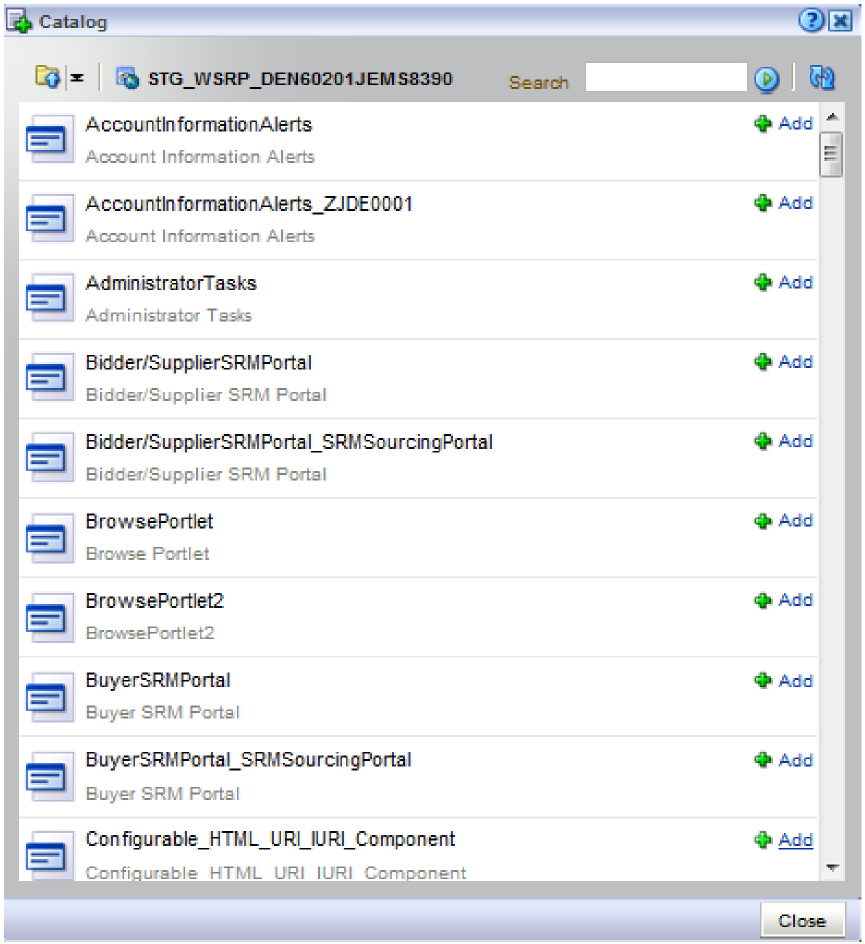
13. Click on *Edit Page* options available under page actions.



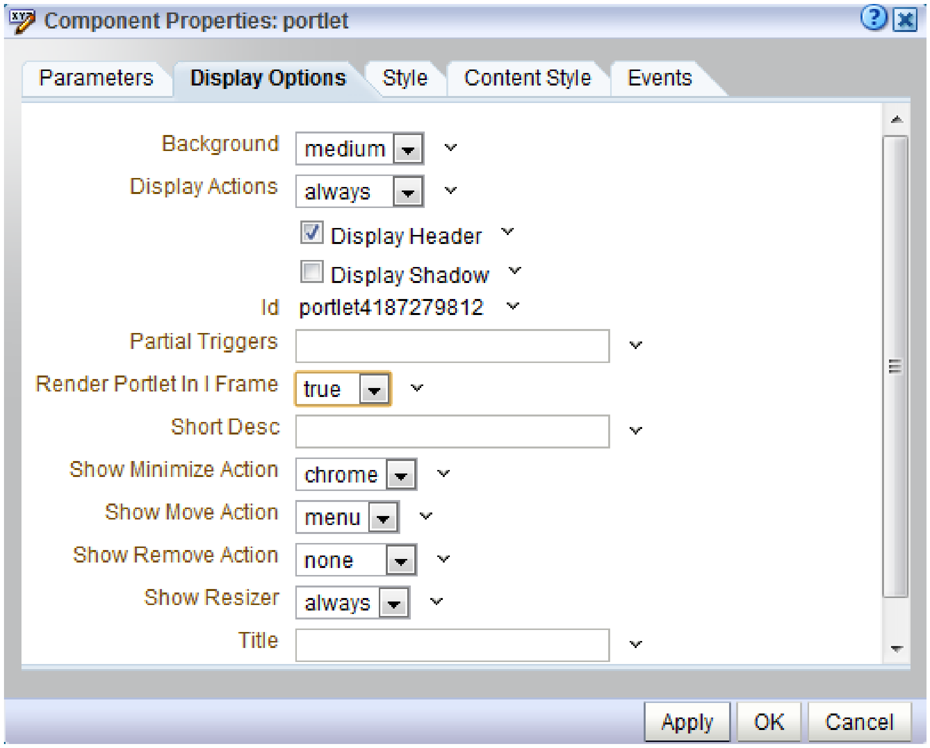
14. Click on *Add Box Down*.



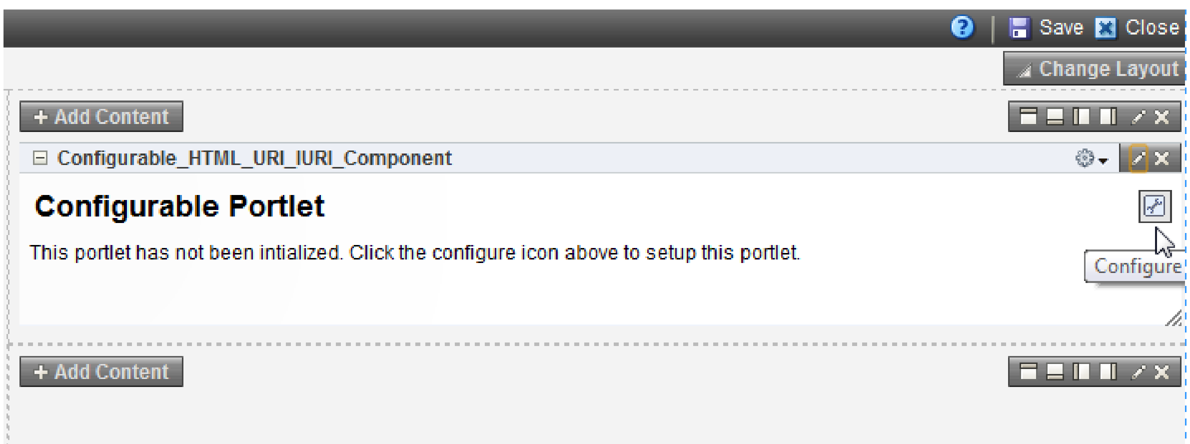
15. Click on *Add Content* to add E1 portlets.



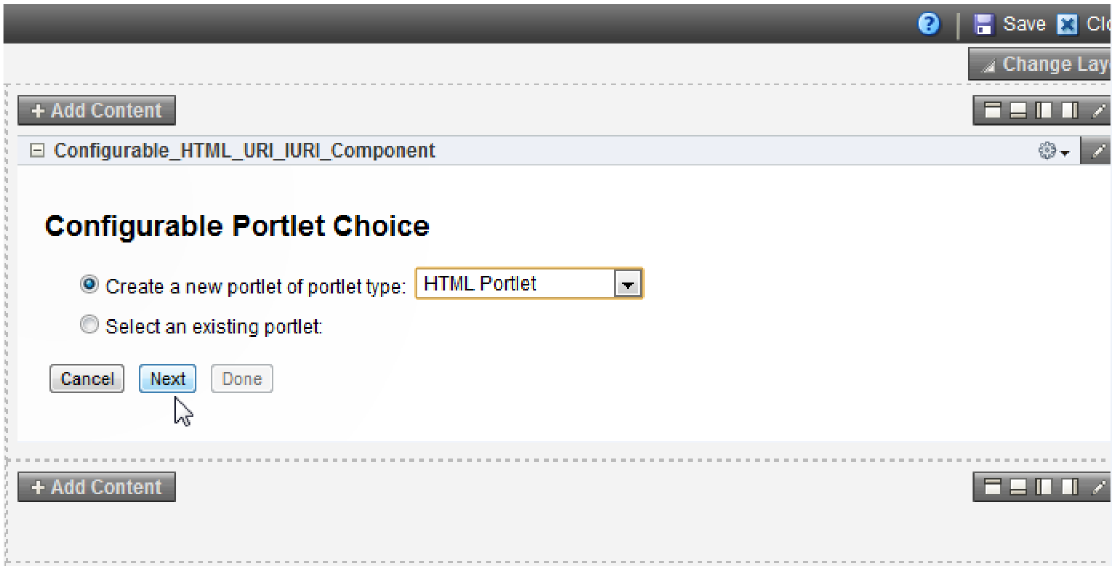
16. Follow the steps 5, 6 and add Configurable_HTML_URI_IURI_Component from the available list as shown in the following image.



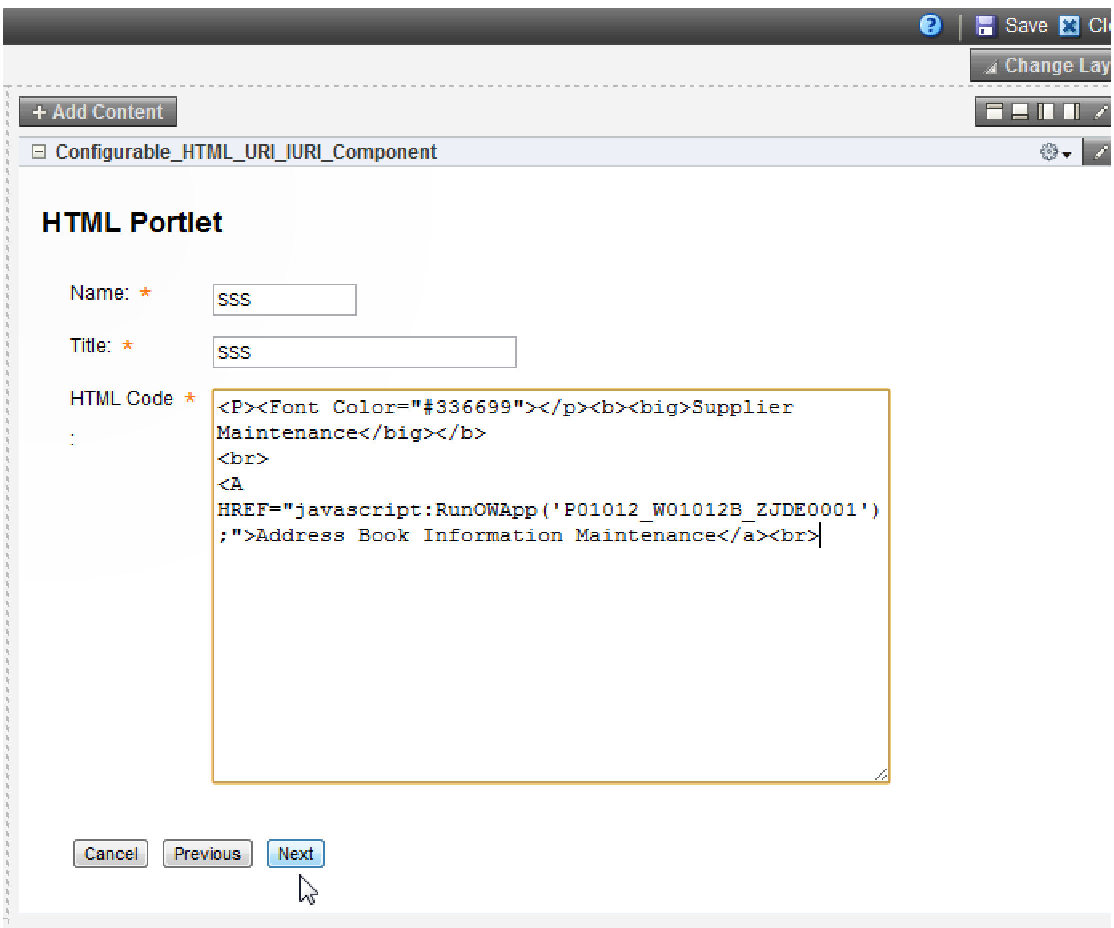
17. Click on the edit button of the portlet and select the *Display Options* tab. Set the property *Render Portlet in I Frame* to true as shown in the screen shot below.



18. Click the *Configuration* icon.



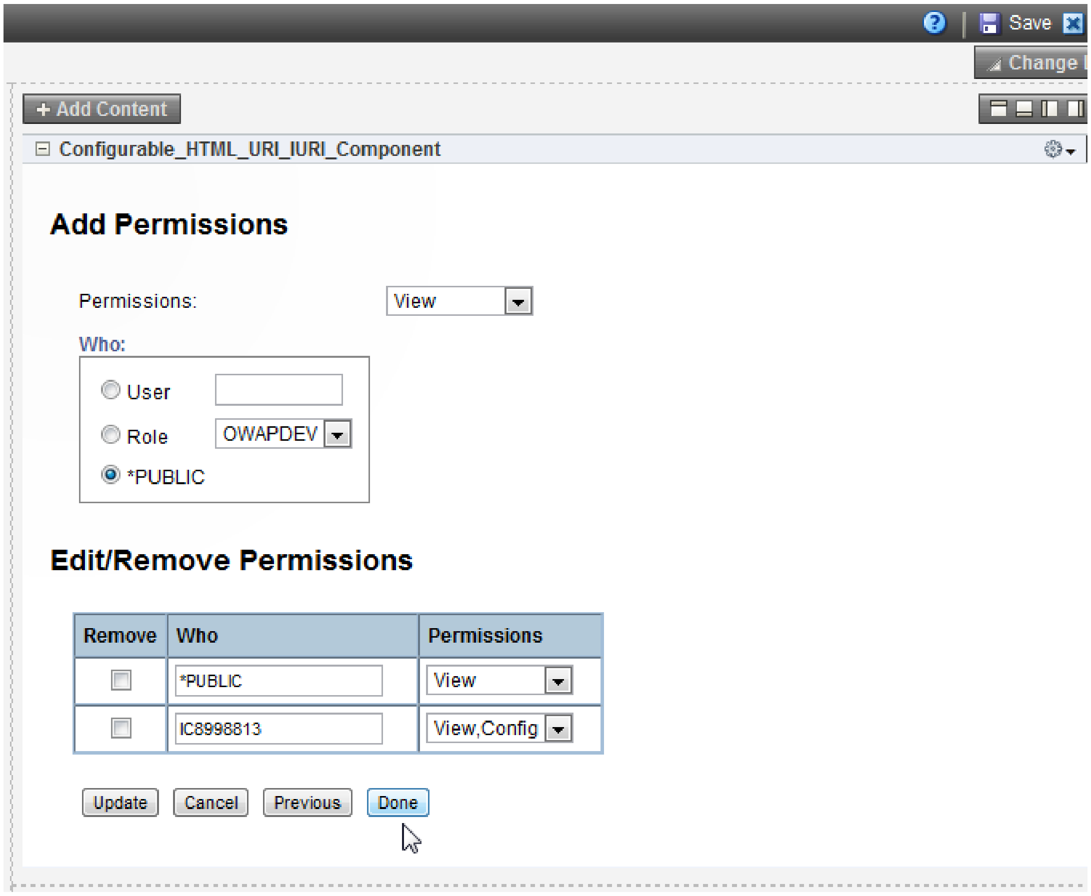
19. Select HTML Portlet from the available list and click *Next*.



20. Enter the Name as *SSS* and Title as *SSS* and paste following text in “HTML Code” text area and click “NEXT” button.

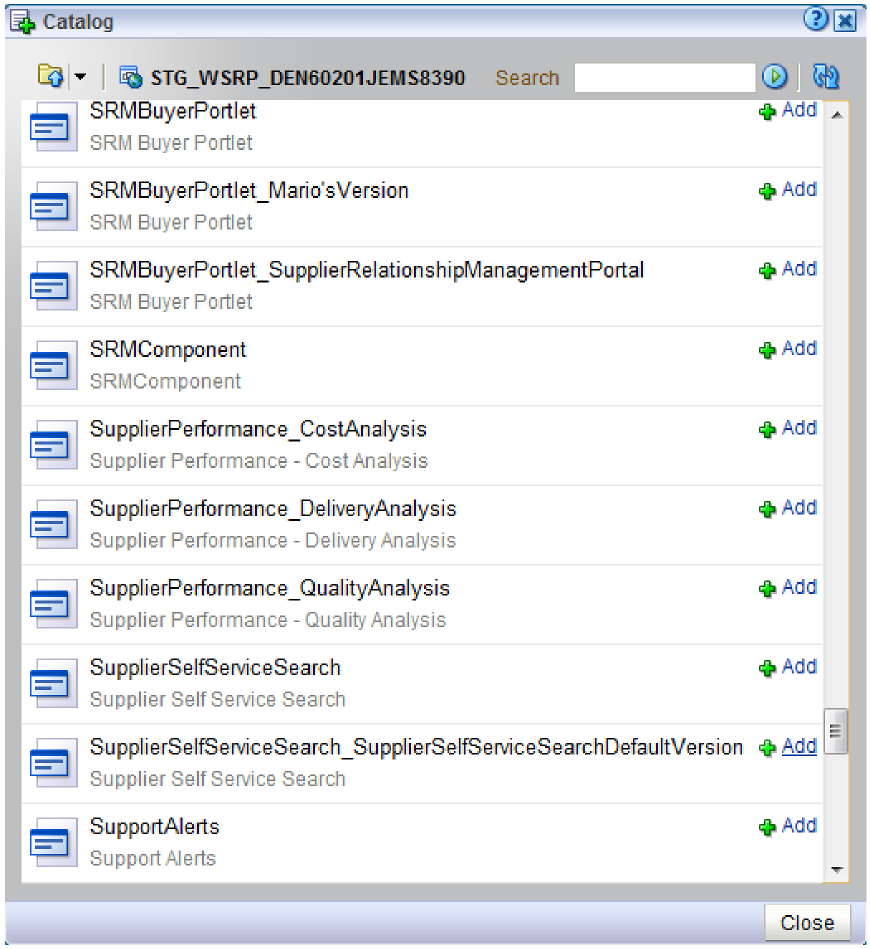
```
<P><Font Color="#336699"></p><b><big>Supplier Maintenance</big></b>
<br>
<A HREF="javascript:RunOWApp('P01012_W01012B_ZJDE0001');">Address Book
```

```
Information Maintenance</a><br>
```

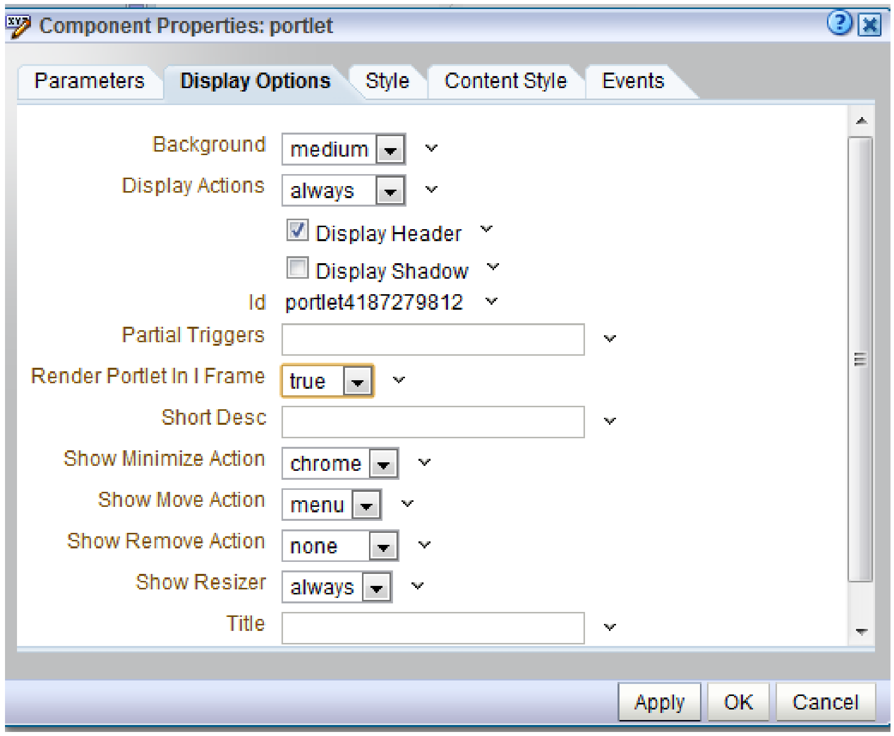


21. Set required permissions and click *Done*.

22. Click on *Add Content* to add EnterpriseOne portlets.



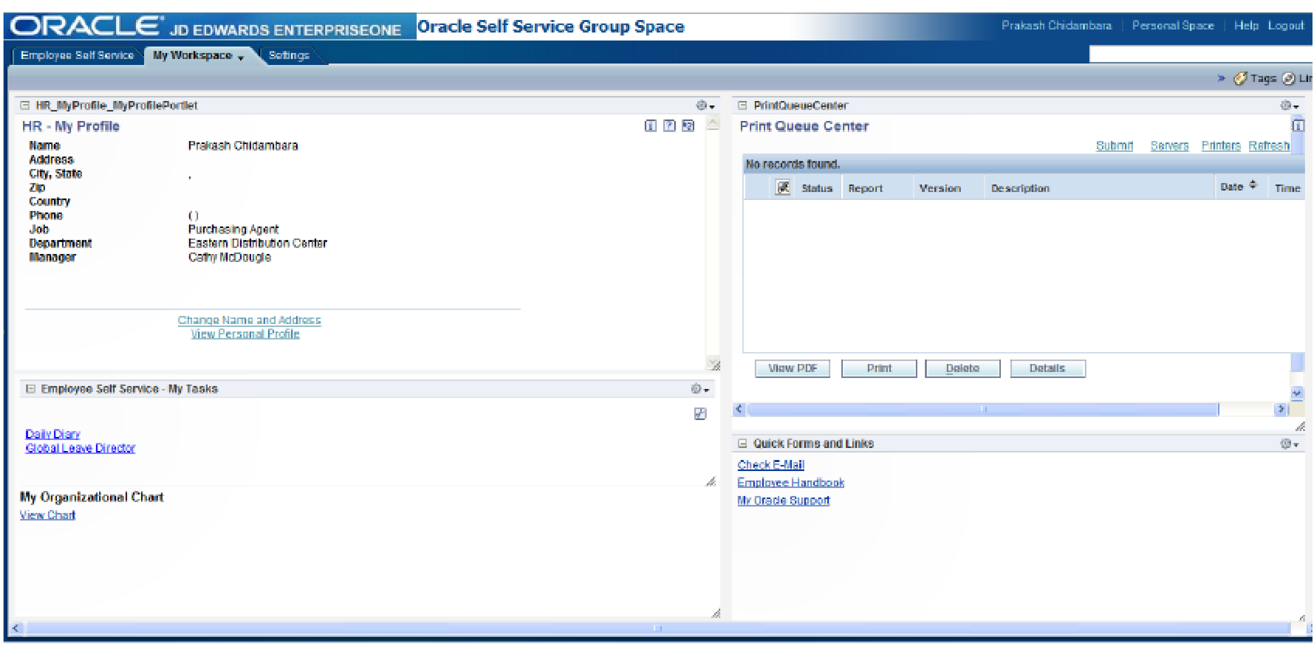
23. Follow the steps 5 and 6 and add Supplier Self Service Search from the available list.



24. Click on the edit button of the portlet and select the *Display Options* tab. Set the property *Render Portlet in I Frame* to true.

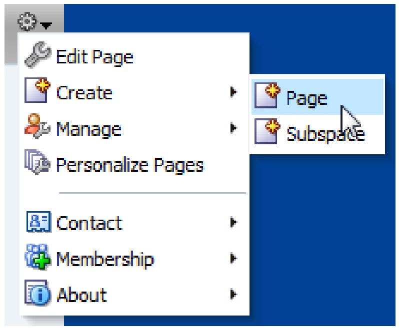
8.7 Creating a My Workspace Portal Page

The sample My Workspace portal page layout has portlets arranged in two columns. The page has two EnterpriseOne FDA portlets one Configurable HTML portlet and two WebCenter portlets, as shown below.

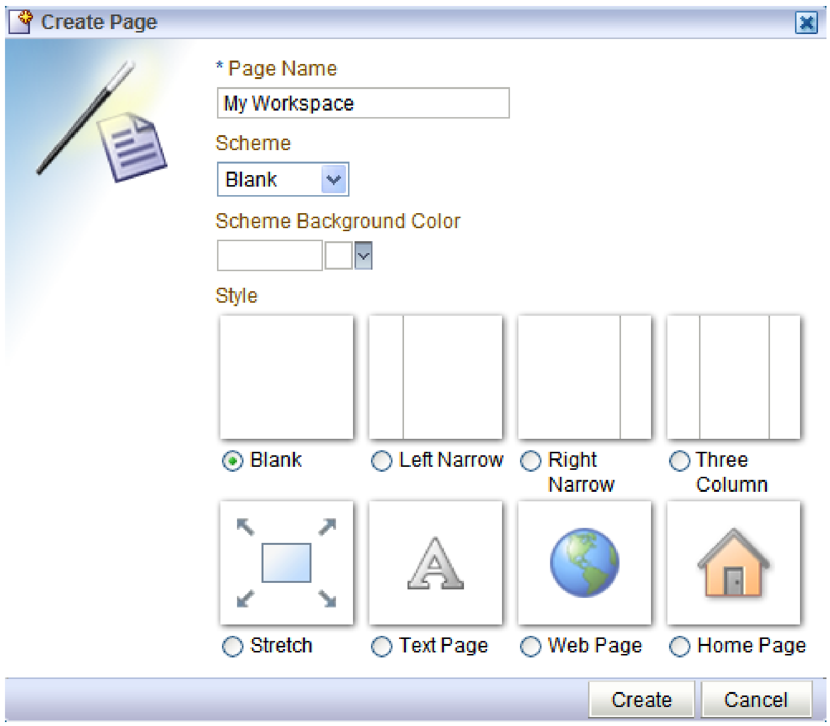


Follow these steps to create the My Workspace portal page:

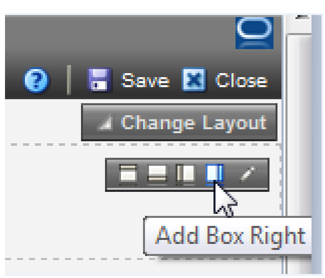
1. Log into WebCenter and access the Oracle Self Service Space the was created in the previous section.



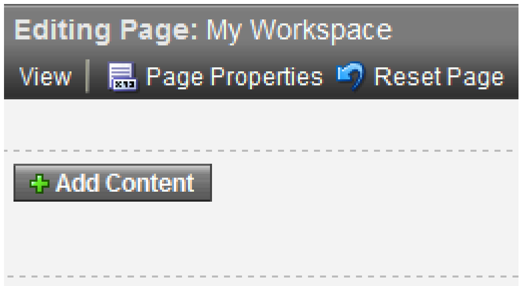
2. Click the *Page Actions* dropdown arrow, then select *Create*, and then *Page*.



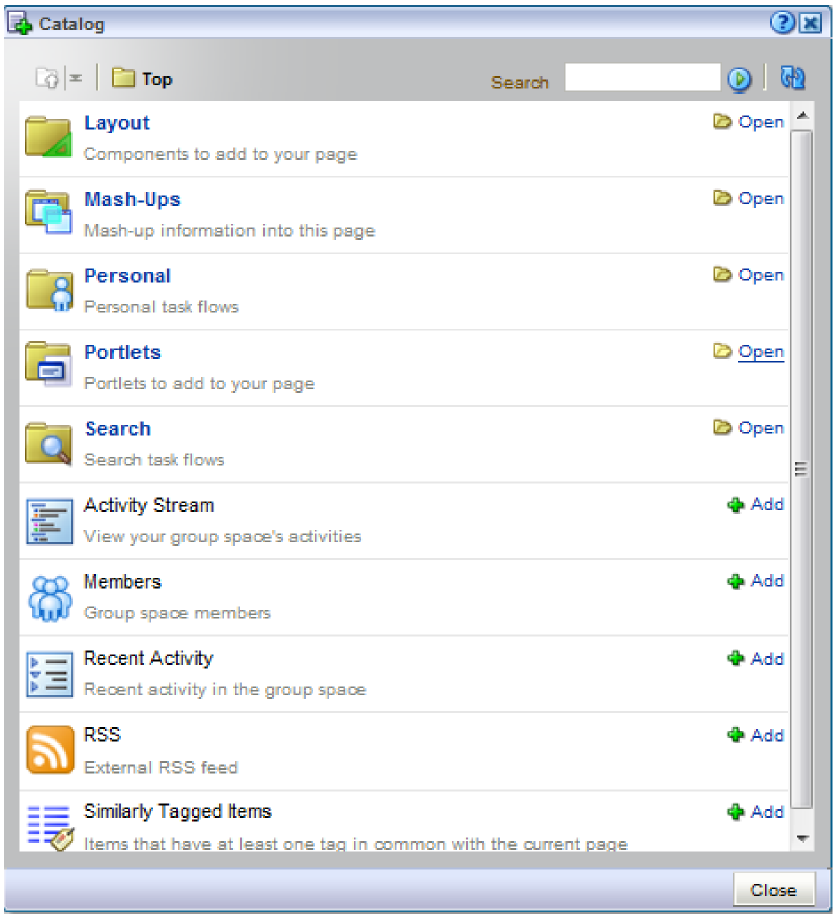
3. Enter Page Name as *My Workspace* and let the Scheme be Blank. Click the *Create* button. This will show My Workspace page in Edit mode having only one column.



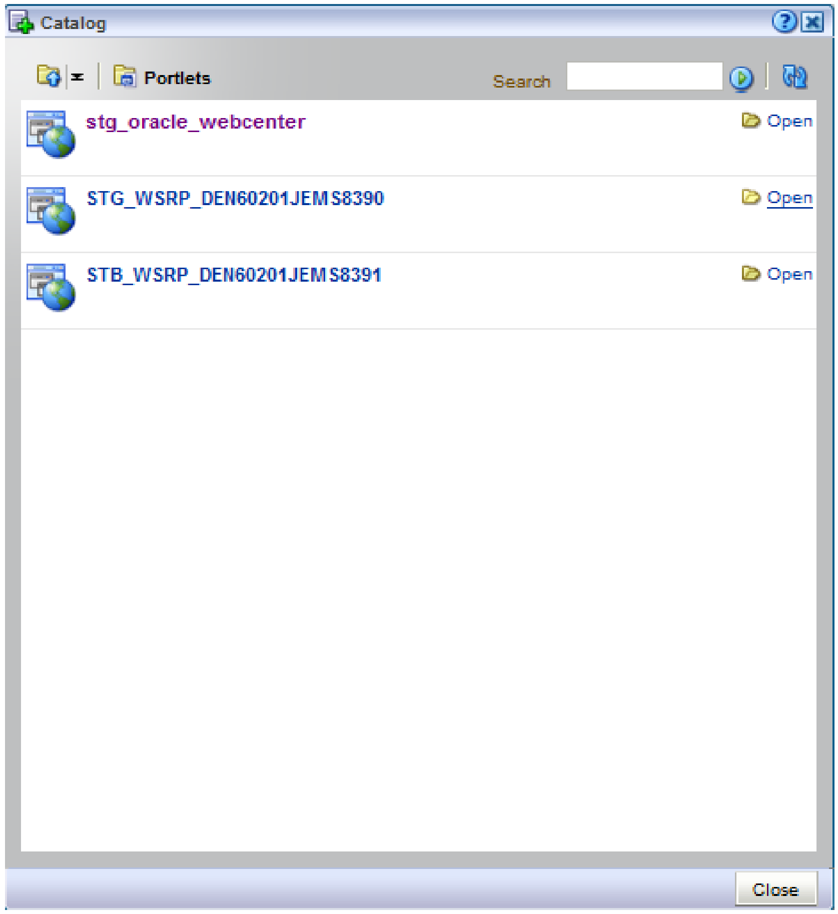
4. Since the sample page has two columns click on *Add Box Right* as shown in this image.



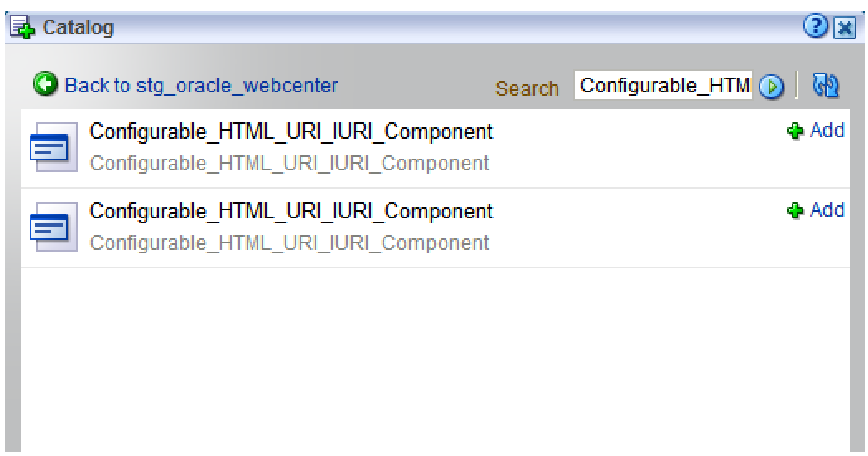
5. Click **Add Content** on the left pane to add portlets.



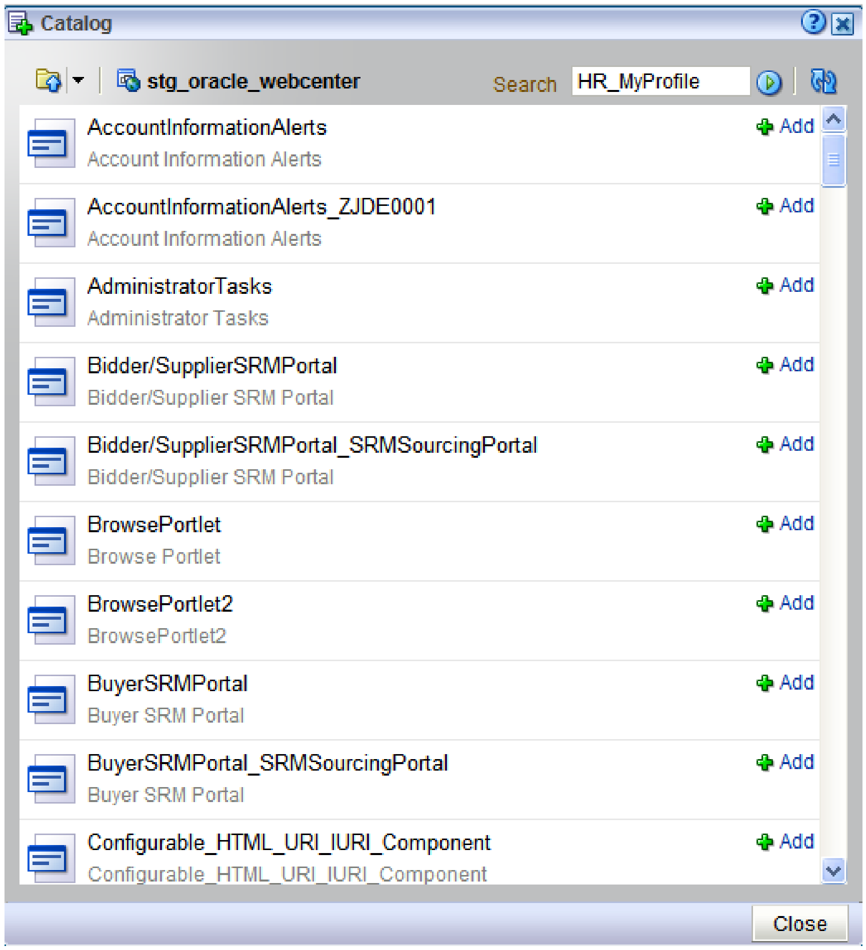
6. Open the *Portlets* catalog.



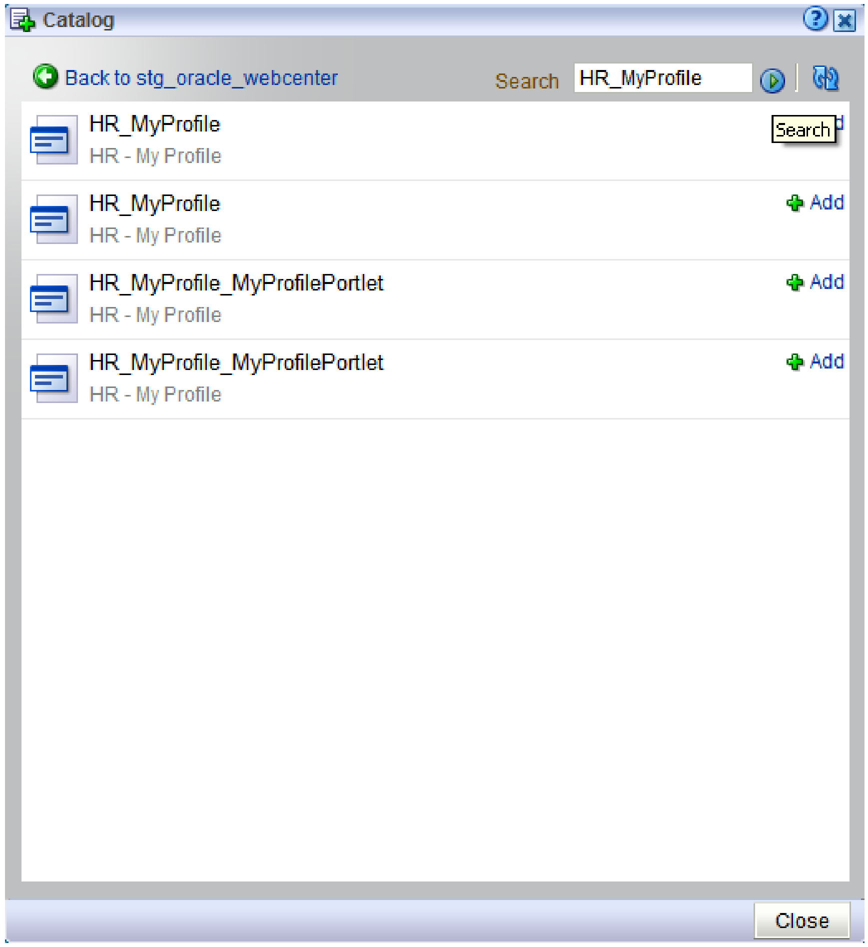
7. Open *stb_oracle_webcenter* (this name could be different based on the setup) to see the list of E1 portlets available.



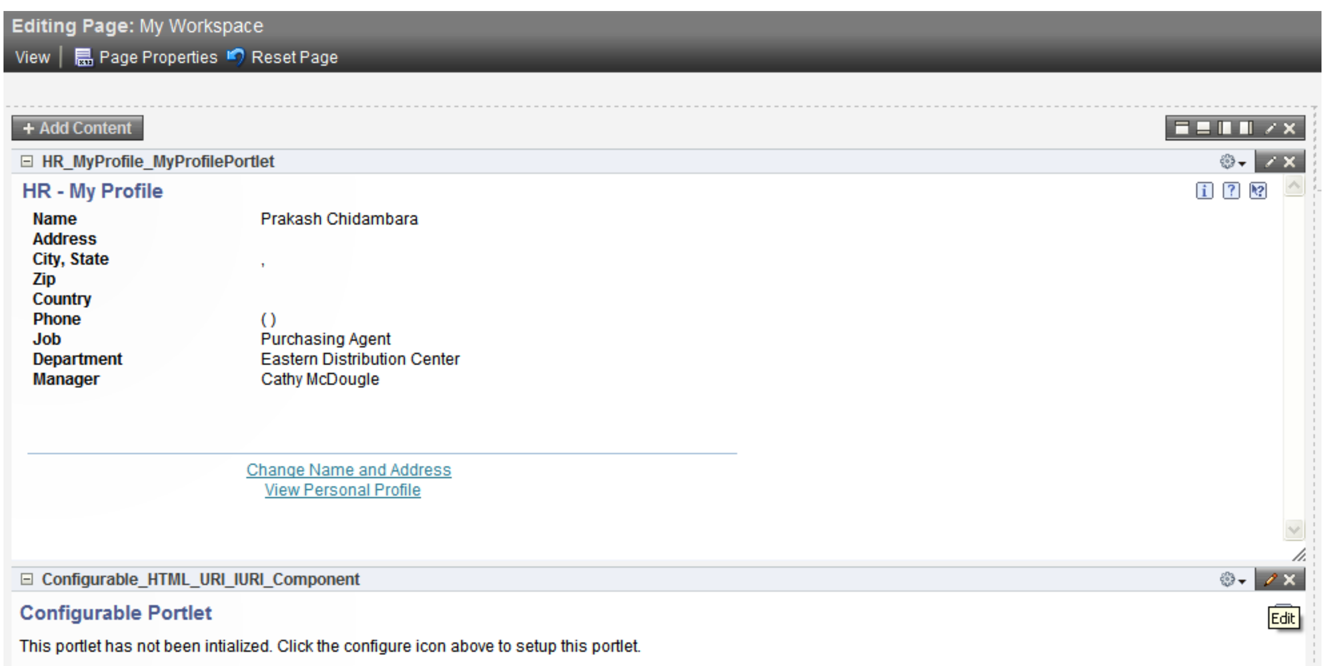
8. Add two Configurable HTML portlets. To add the *Configurable_HTML_URI_IURI_Component* portlet to the left pane, search for the string *Configurable_HTML* to find the list of portlets, starting with the string Configurable_HTML.



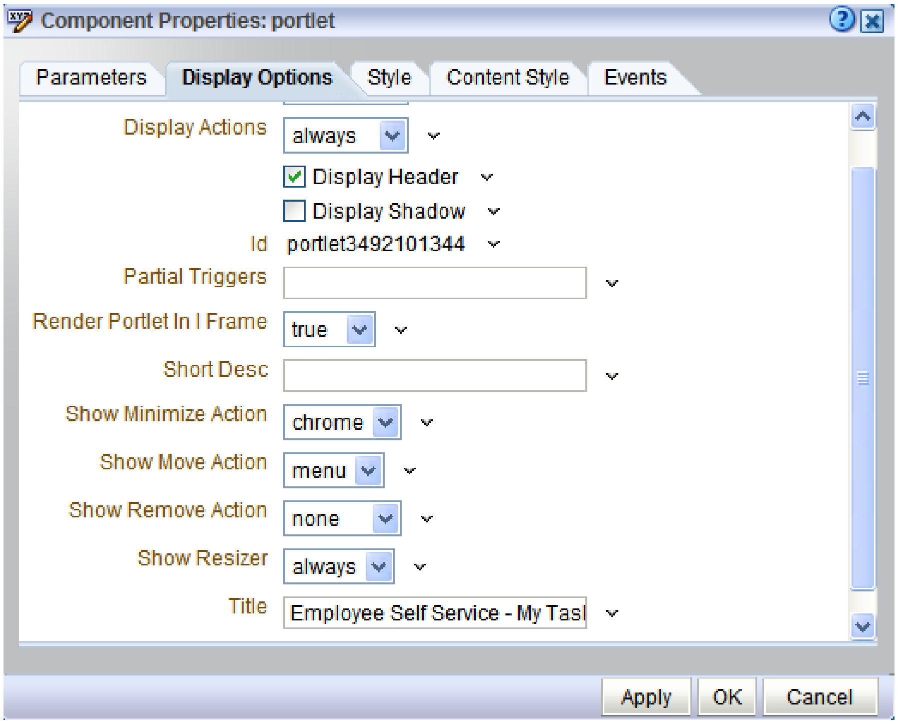
9. To add the HR - My Profile portlet to the left pane, search for the string *HR_MyProfile* to find the list of HR_MyProfile portlets available, and then add the required portlet from the list to the portal page.



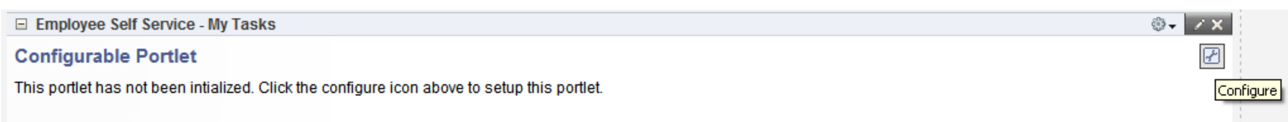
10. Add the required portlet from the list to the portal page, and then click the *Close* button to close the catalog.



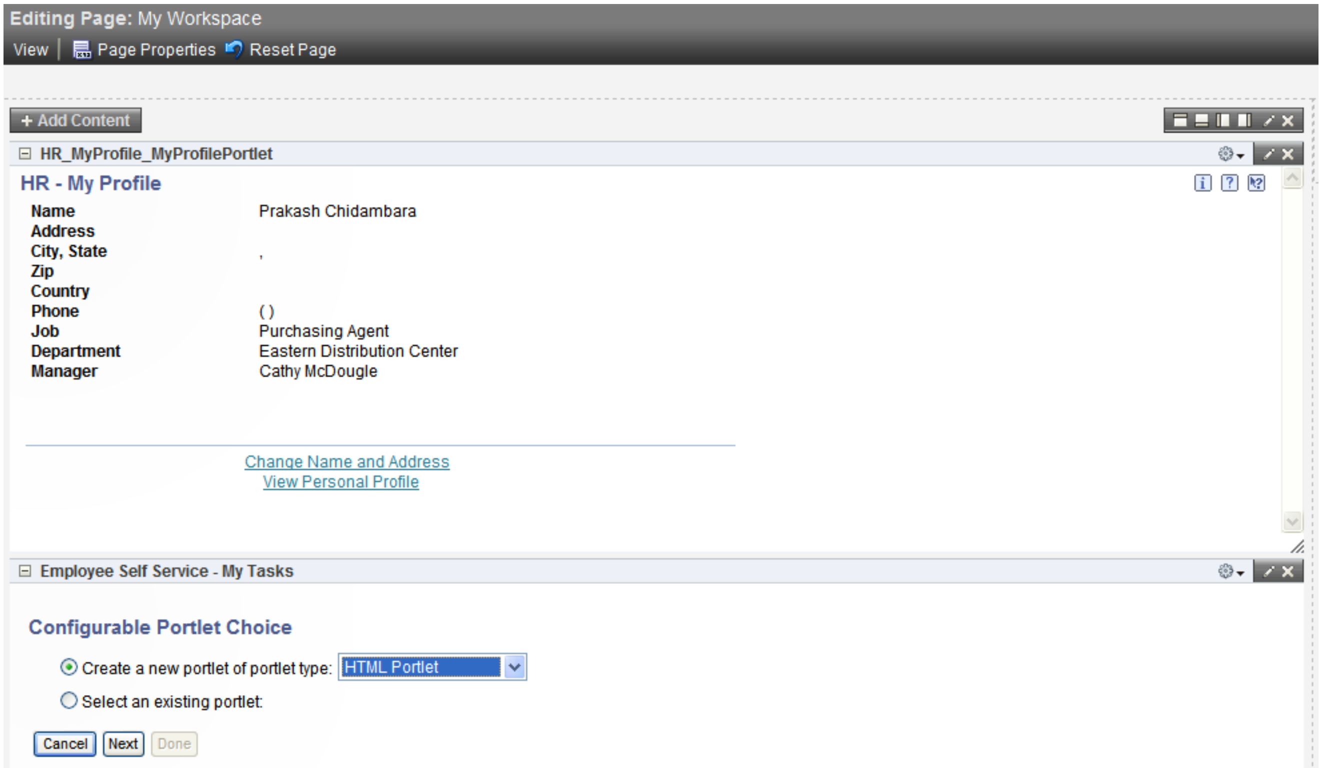
11. To change the header of the Configurable HTML portlet, click the *Edit* button on Configurable HTML portlet as show below.



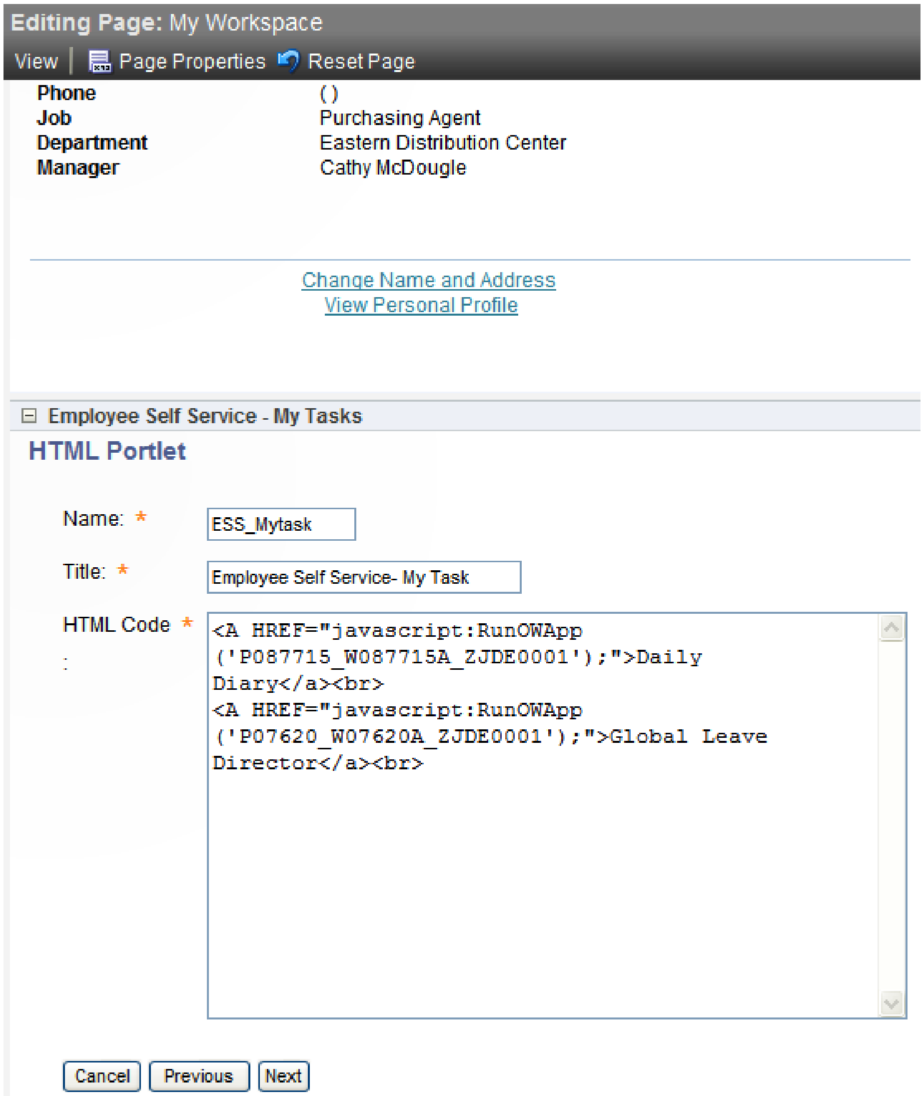
12. On the *Display Options* tab, set Title as *Employee Self Service - My Task*.



13. To configure the Configurable HTML portlet, click the *Configure* icon on the portlet. Make sure that the steps given under the topic *Required WebCenter EnterpriseOne Portlets Setup* are completed for the configurable portlet to work.



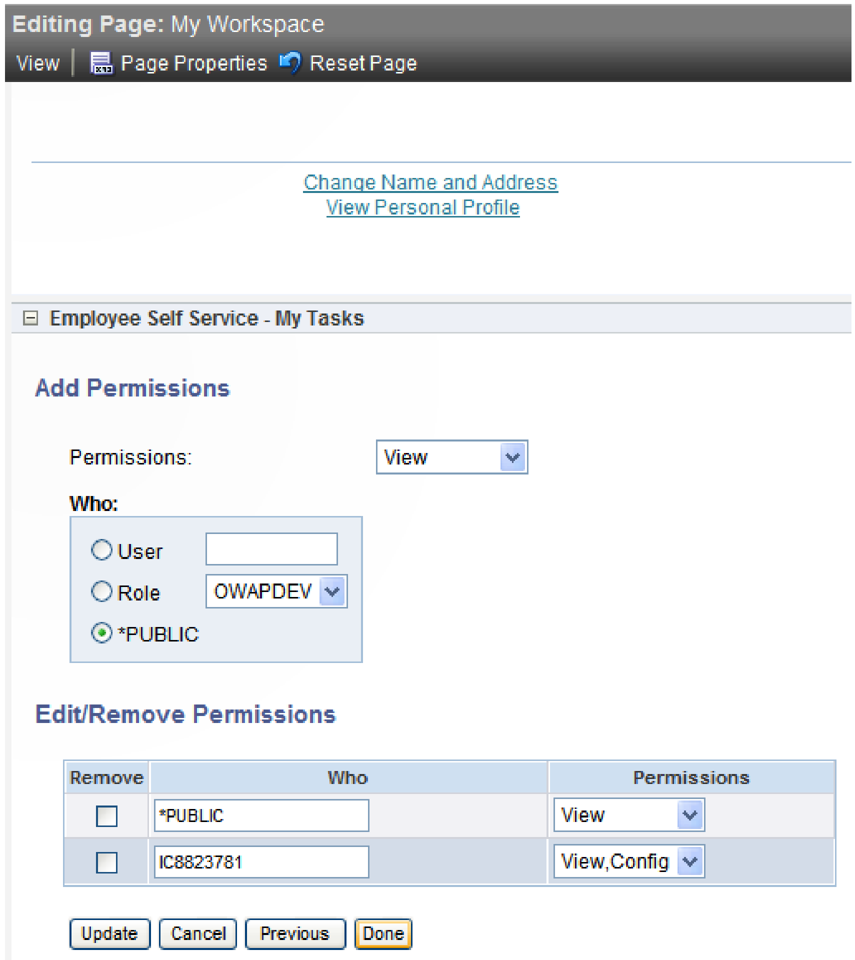
14. Make sure that *Create a new portlet of portlet type* radio button is selected and select *HTML Portlet* from the list.



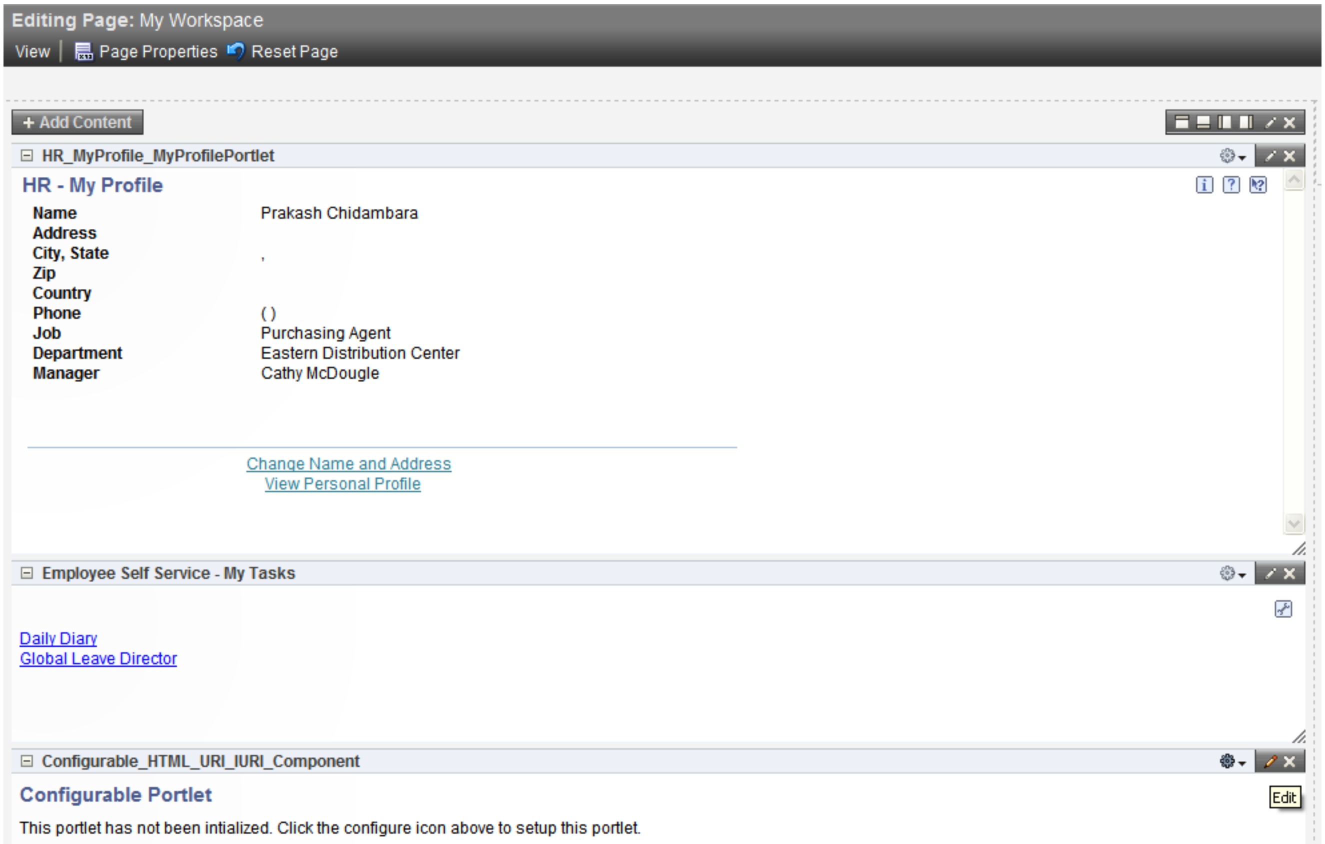
15. Enter the Name as *ESS_MyTask* and Title as *ESS My Task* and paste following text in the HTML Code text area. Click *Next*.

   <A HREF="javascript:RunOWApp('P087715_W087715A_ZJDE0001');">Daily Diary

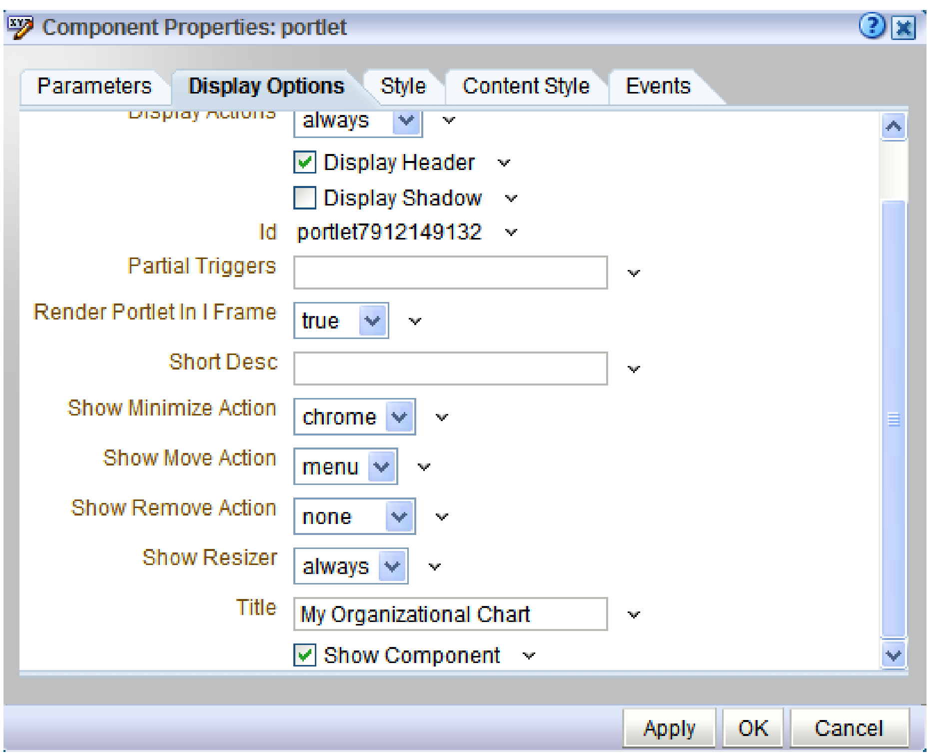
   <A HREF="javascript:RunOWApp('P07620_W07620A_ZJDE0001');">Global Leave Director



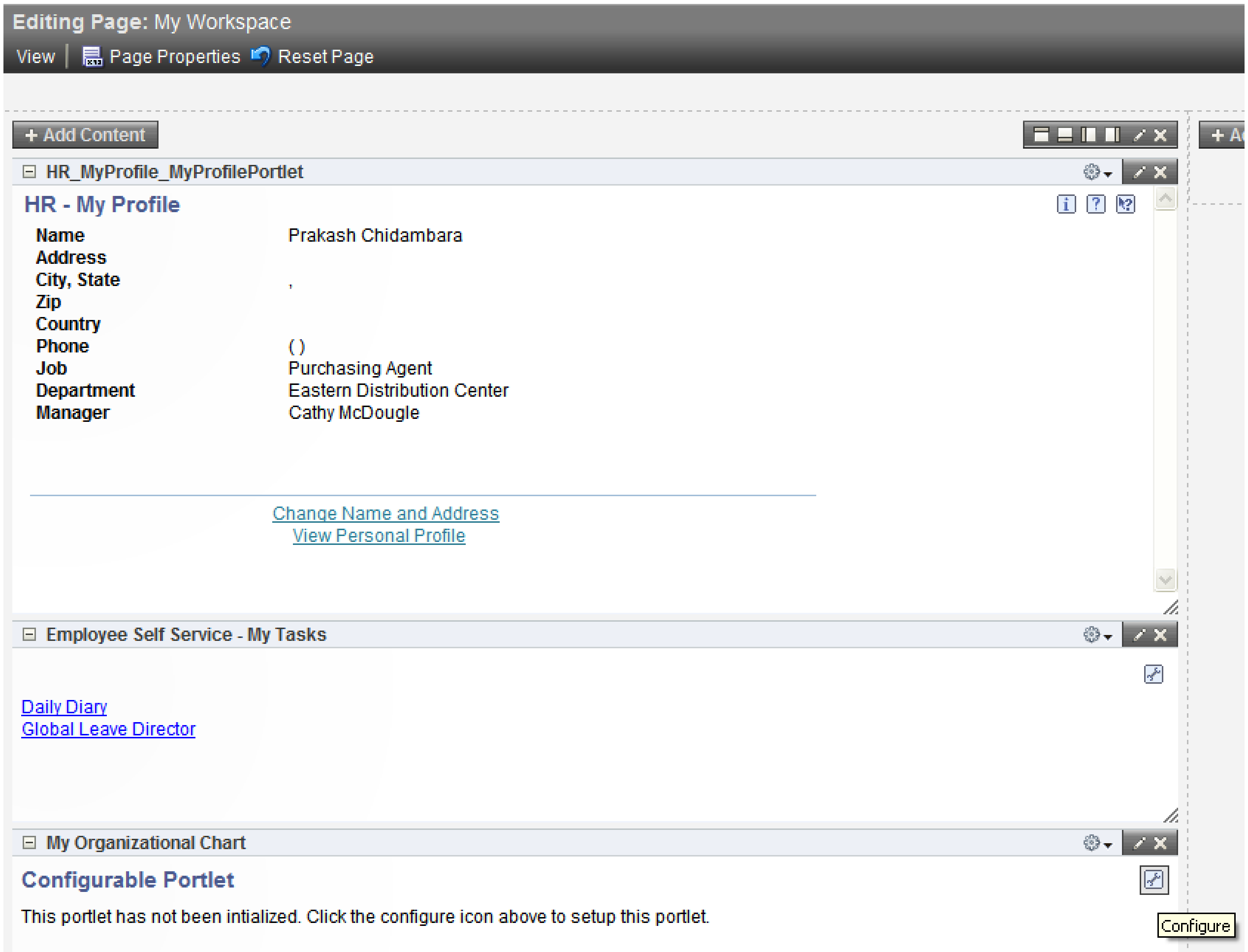
16. Set required permissions. Click *Done*.



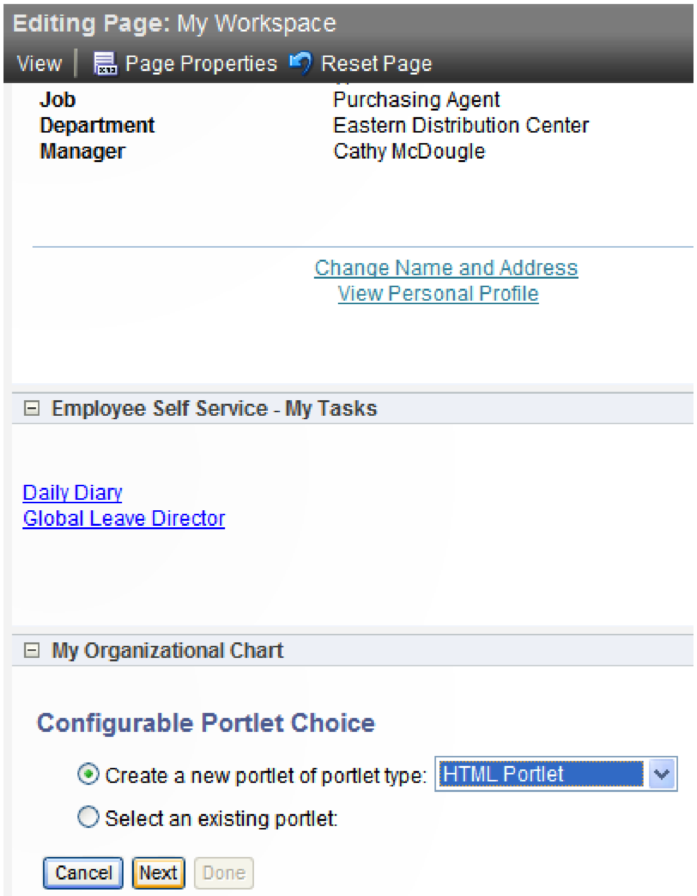
17. To change the header of the second Configurable HTML portlet, click the *Edit* button on the Configurable HTML portlet.



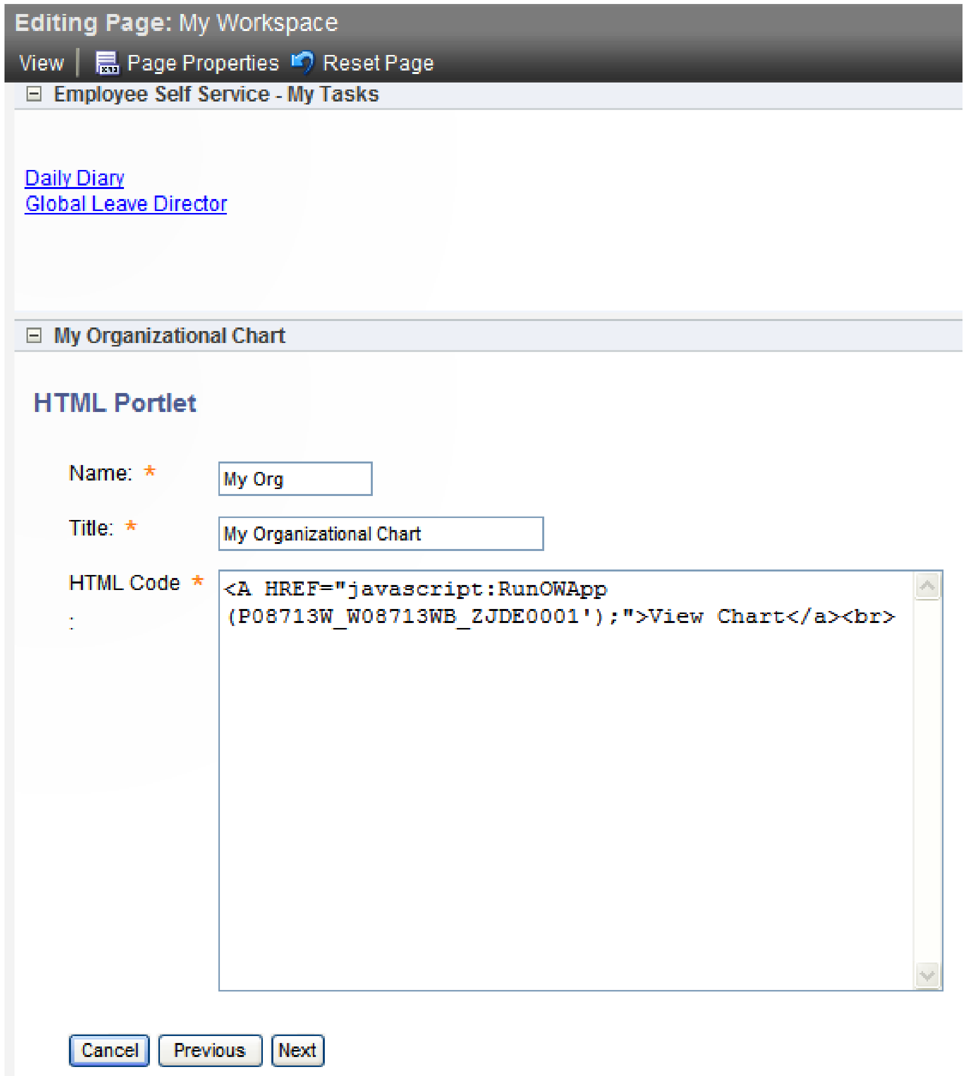
18. On the *Display Options* tab, set the Title as *My Organizational Chart*.



19. To configure the Configurable HTML portlet, click the *Configure* icon of the portlet. Make sure that the steps given under the topic *Required WebCenter EnterpriseOne Portlets Setup* are completed for the configurable portlet to work.

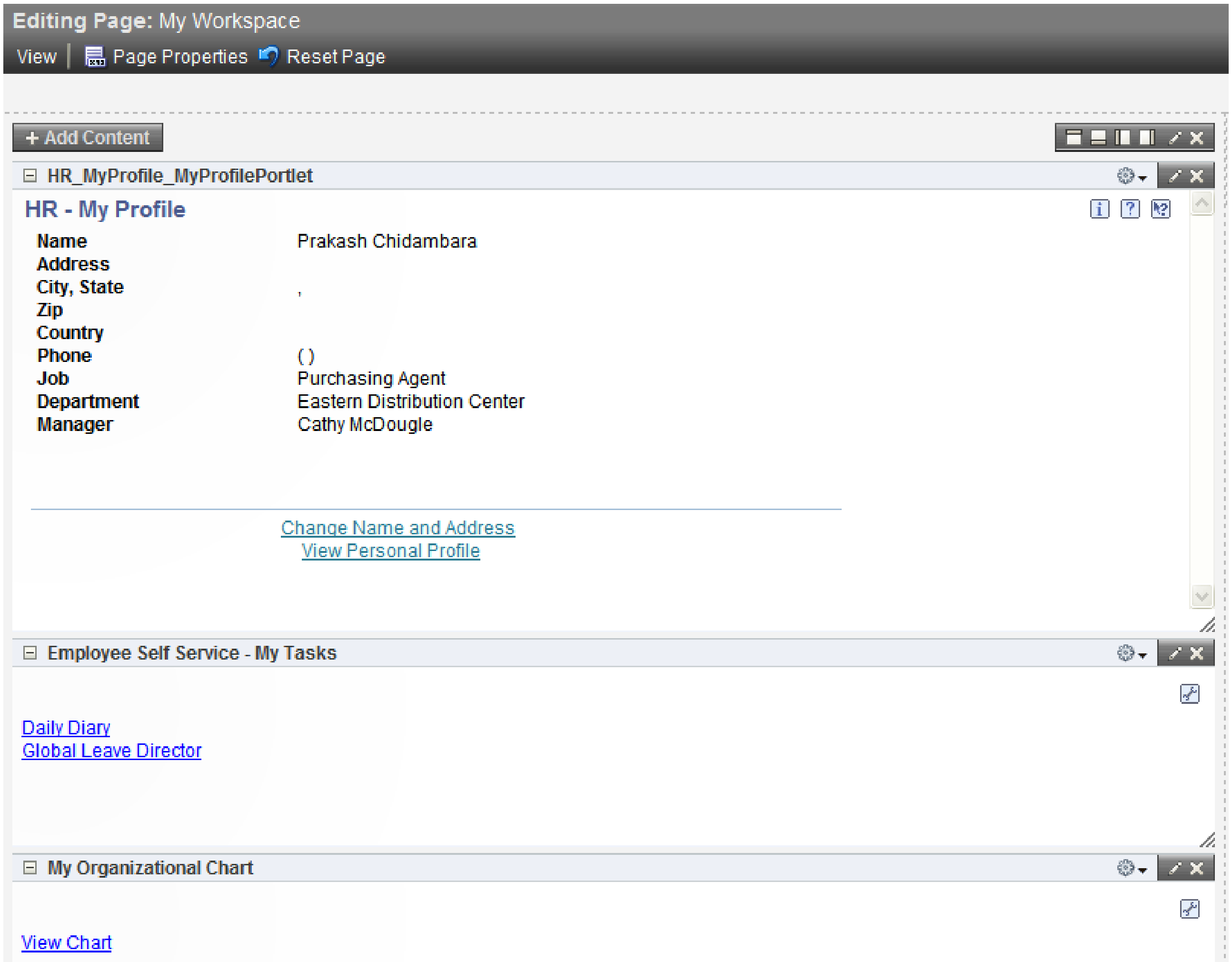


20. Make sure that *Create a new portlet of portlet type* radio button is selected. Select *HTML Portlet* from the list.



21. . Enter the Name as *My Org* and Title as *My Organizational Chart*. Paste the following text in the HTML Code text area. Click *Next*.

<A HREF="javascript:RunOWApp('P08713W_W08713WB_ZJDE0001');">View Chart

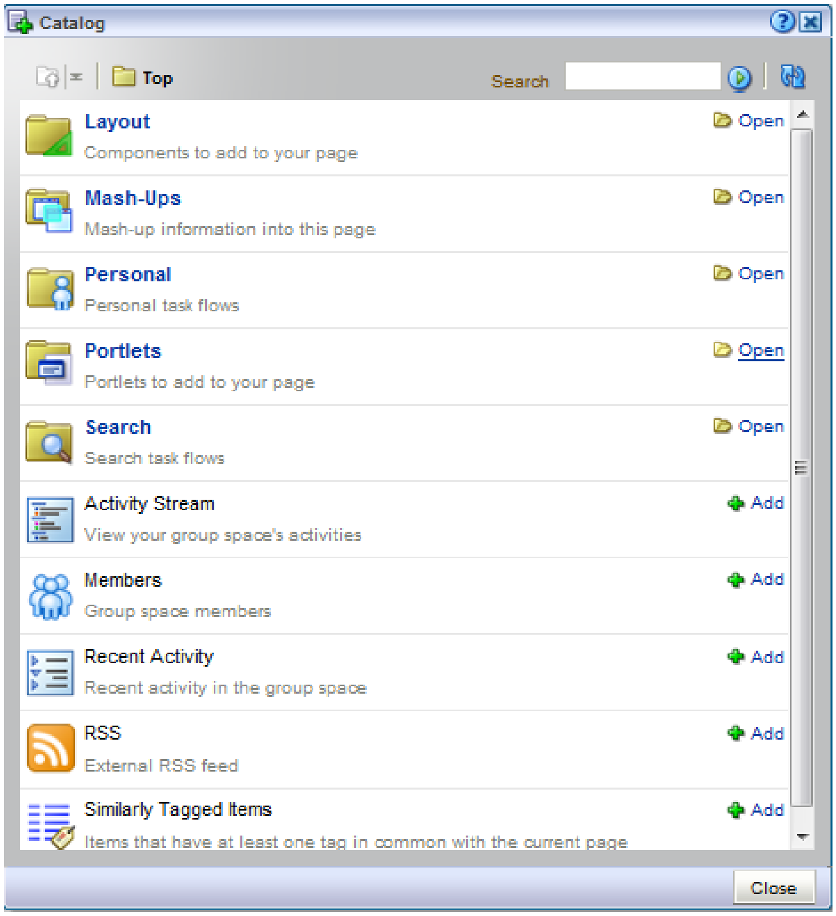


22. Set required permissions. Click *Done*.

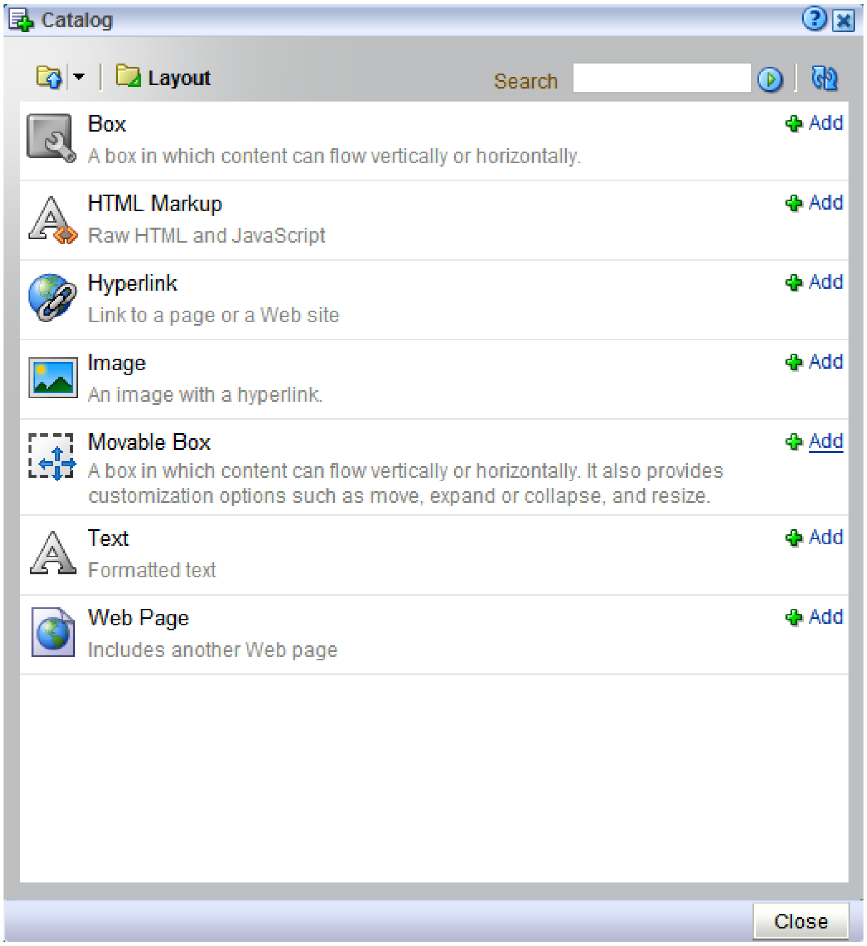
Adding Portlets to the Right Pane

To add portlets to the right pane follow these steps:

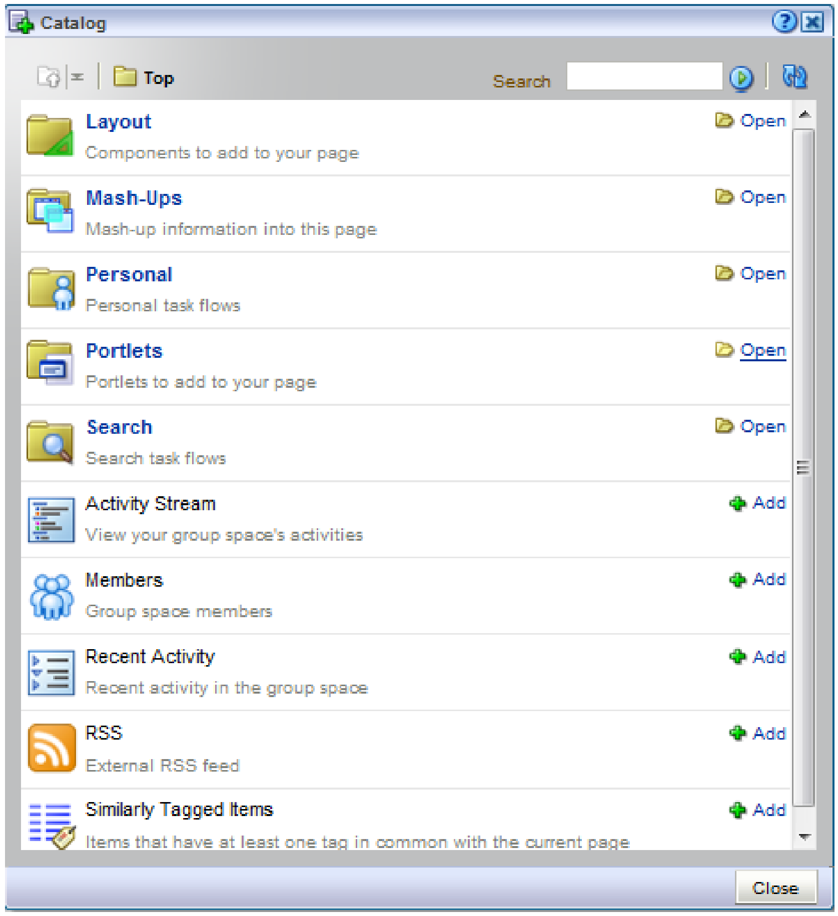
1. Click *Add Content* on the right pane.



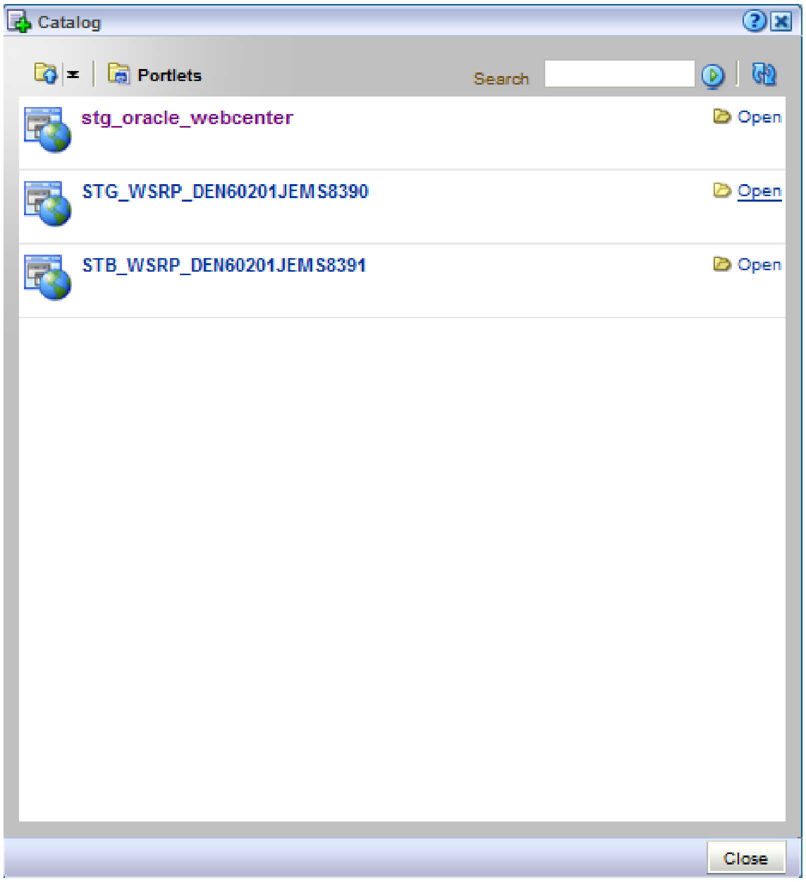
2. Open the *Layout* catalog.



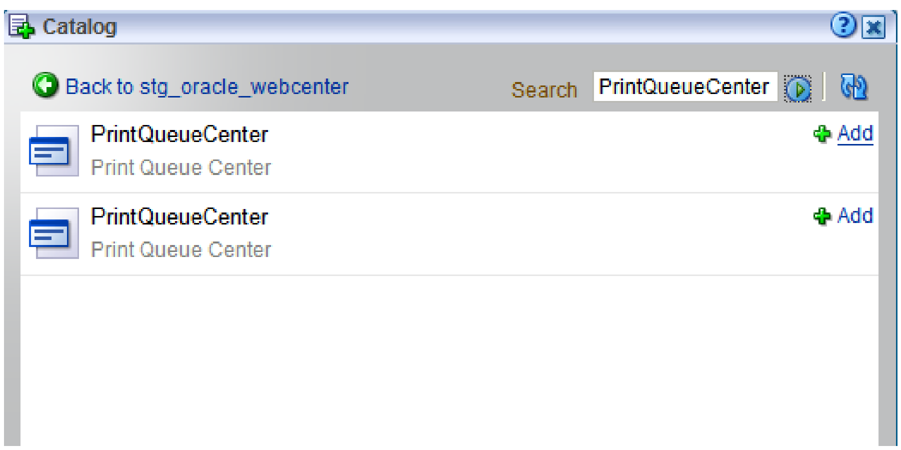
3. Add the *Movable Box* portlet.



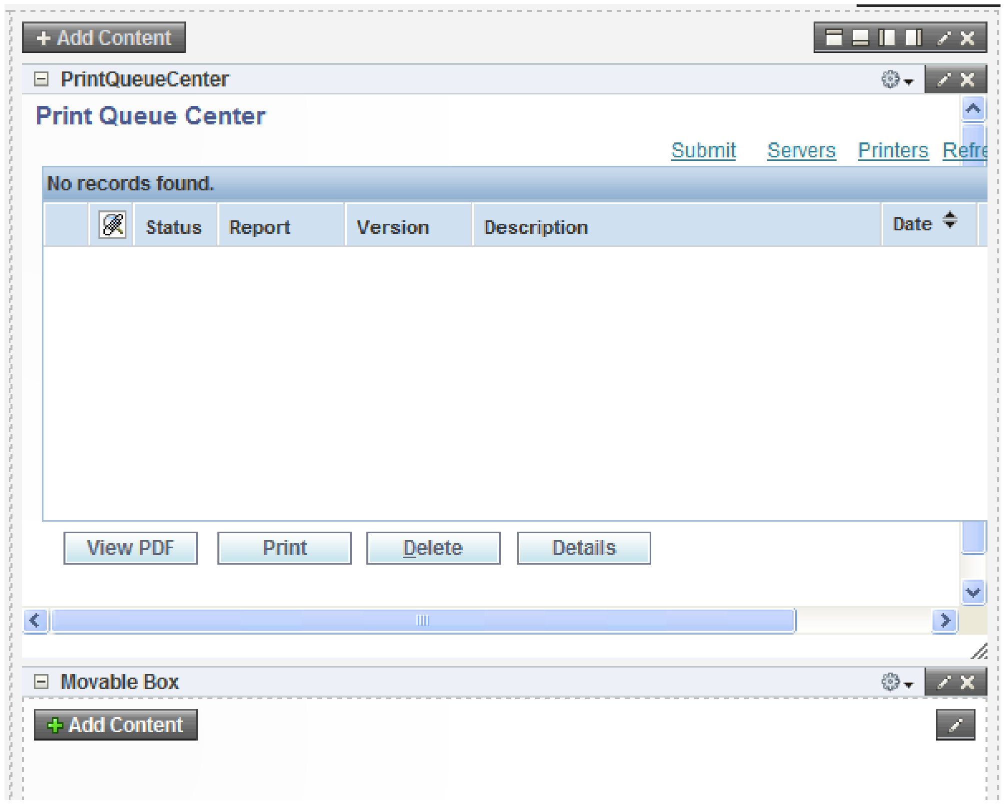
4. Go to the *Portlets* folder.



5. Select *stb_oracle_webcenter* (this name could be different based on the setup) to see the list of EnterpriseOne portlets available.



6. To add the *Print Queue Center* portlet to the right pane, search for the string *PrinQueueCenter* in order to find the list of PrinQueueCenter portlets available, and then add the required portlet from the list to the portal page.
7. Follow these steps to add contents to the *Movable Box* portlet:



a. Click the *Add Content* button on the *Movable Box* portlet.

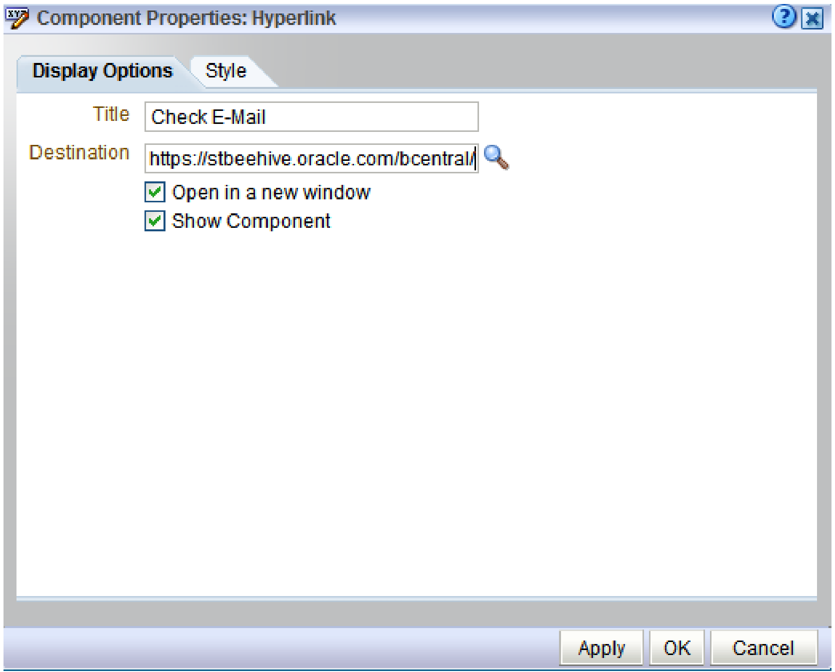
b. Open the *Layout* catalog.

c. Add three hyperlink portlets.

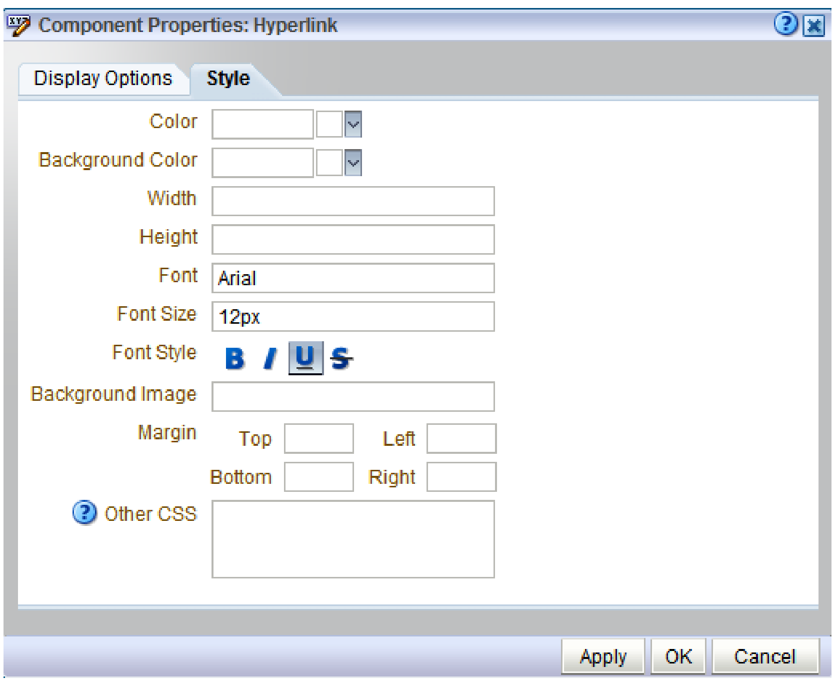
d. Close the Catalog.

8. Follow these steps to configure the hyperlink portlets added in the previous step:

a. Click *Edit* on the hyperlink portlet.

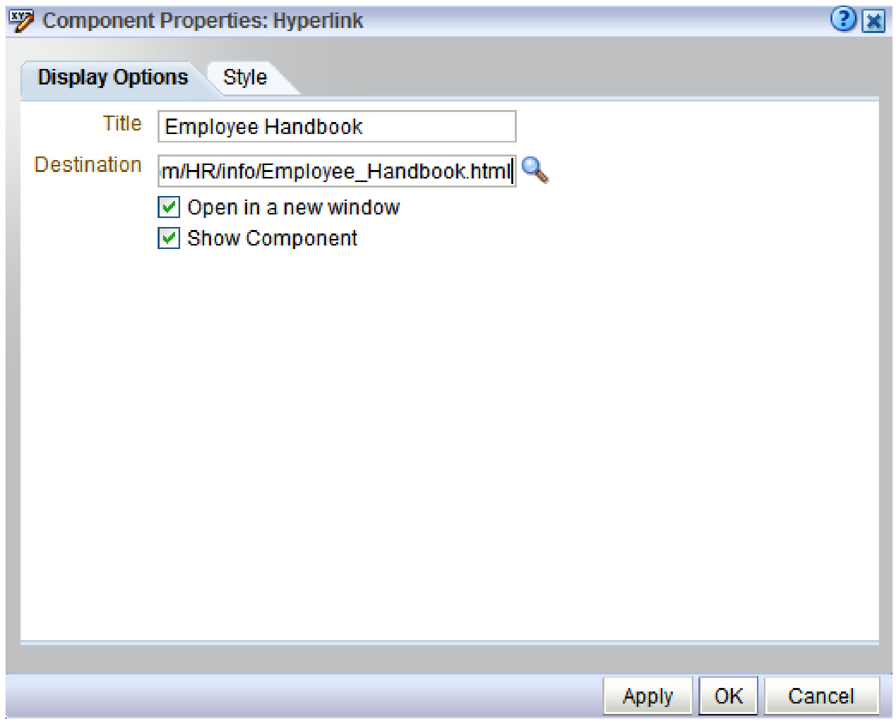


b. On the *Display Options* tab, set Title as *Check E-mail* and set Destination with the URL of the Web mail. Make sure that *Open in a new window* is checked so that the web mail opens in a new window.

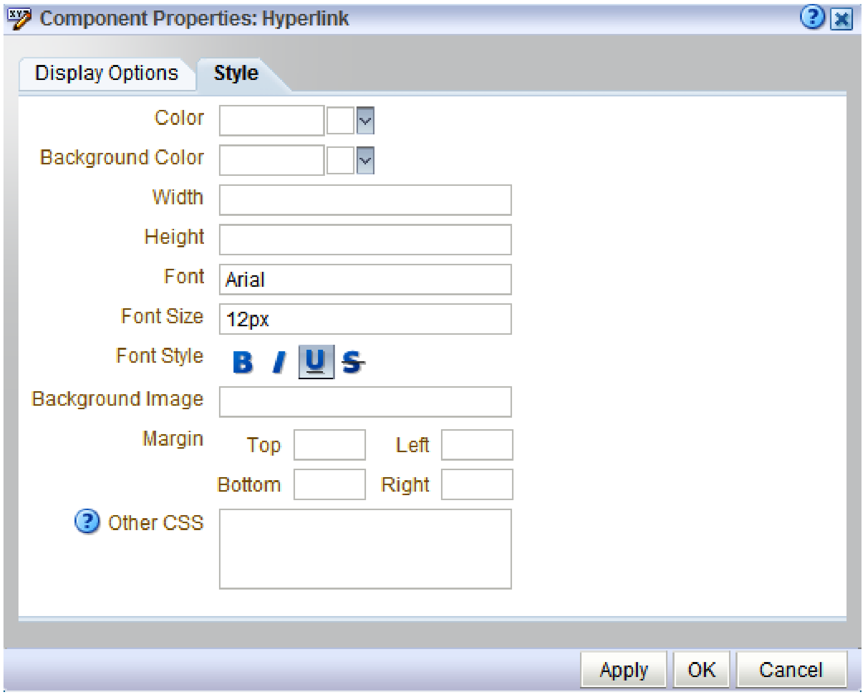


c. On the *Style* tab set the *Font* and *Font Size* as shown below. Click *OK*.

d. To configure the second hyperlink portlet, click *Edit* on the hyperlink portlet as shown below.

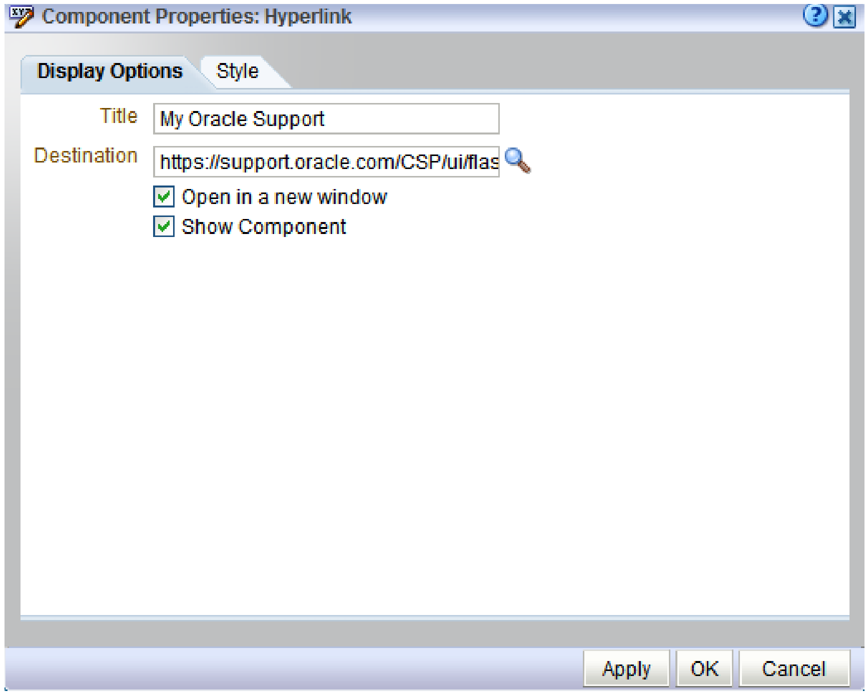


e. On the *Display Options* tab, set Title as *Employee Handbook* and set Destination with the URL of the Employee Handbook. Make sure that *Open in a new window* is checked so that the Employee Handbook opens in a new window.

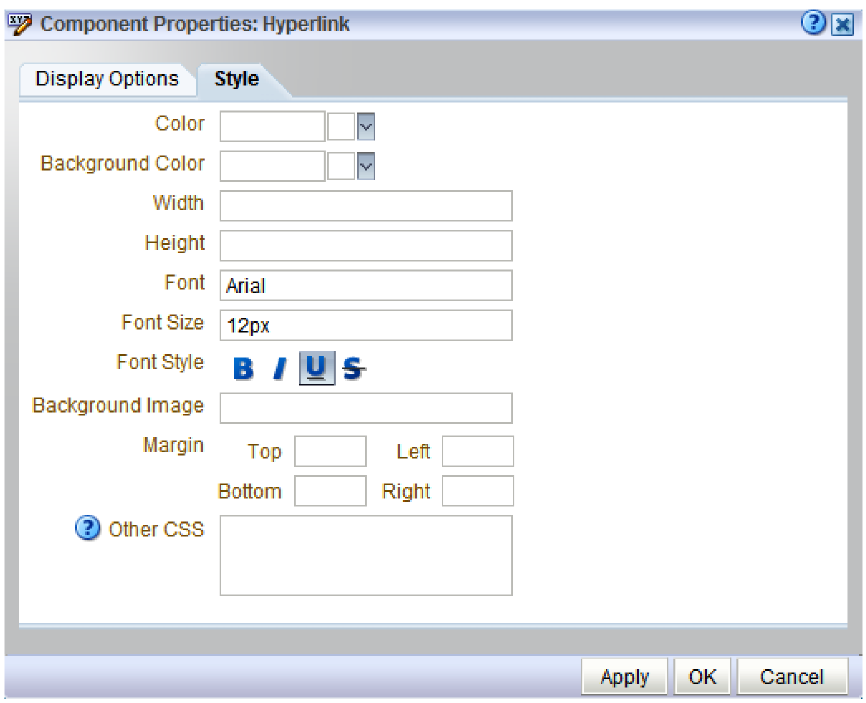


f. On the *Style* tab set the *Font* and *Font Size* as shown below. Click *OK*.

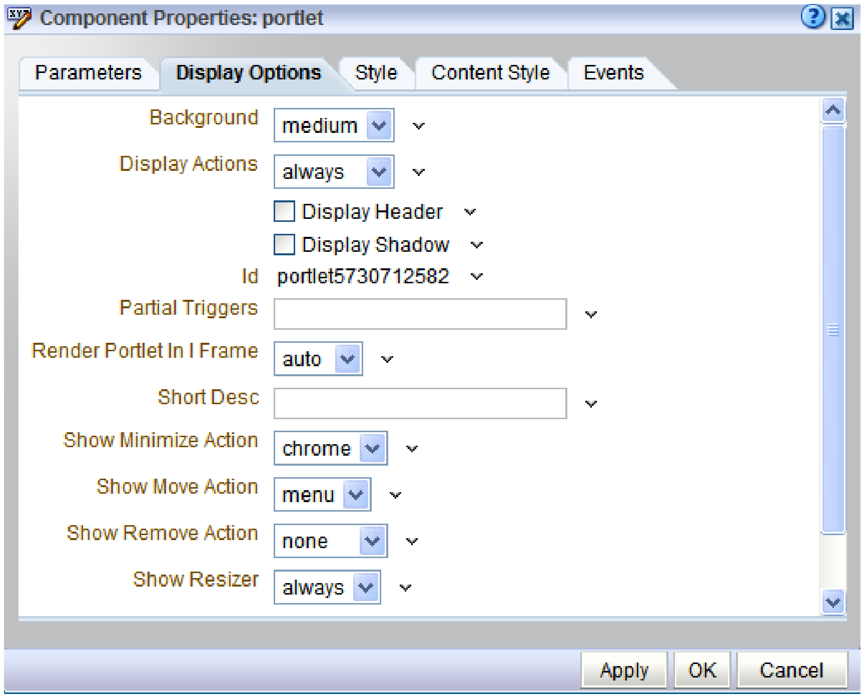
g. To configure the second hyperlink portlet, click *Edit* on the hyperlink portlet as shown below.



h. On the *Display Options* tab, set Title as *My Oracle Support* and set Destination with the URL of the My Oracle Support. Make sure that *Open in a new window* is checked so that the My Oracle Support opens in a new window.



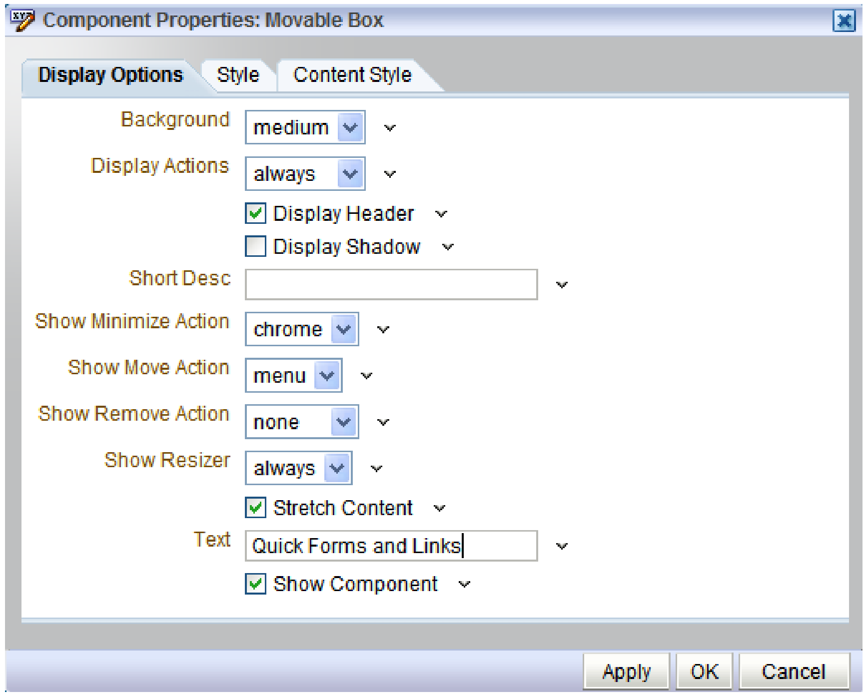
i. On the *Style* tab set the *Font* and *Font Size* as shown below. Click *OK*.



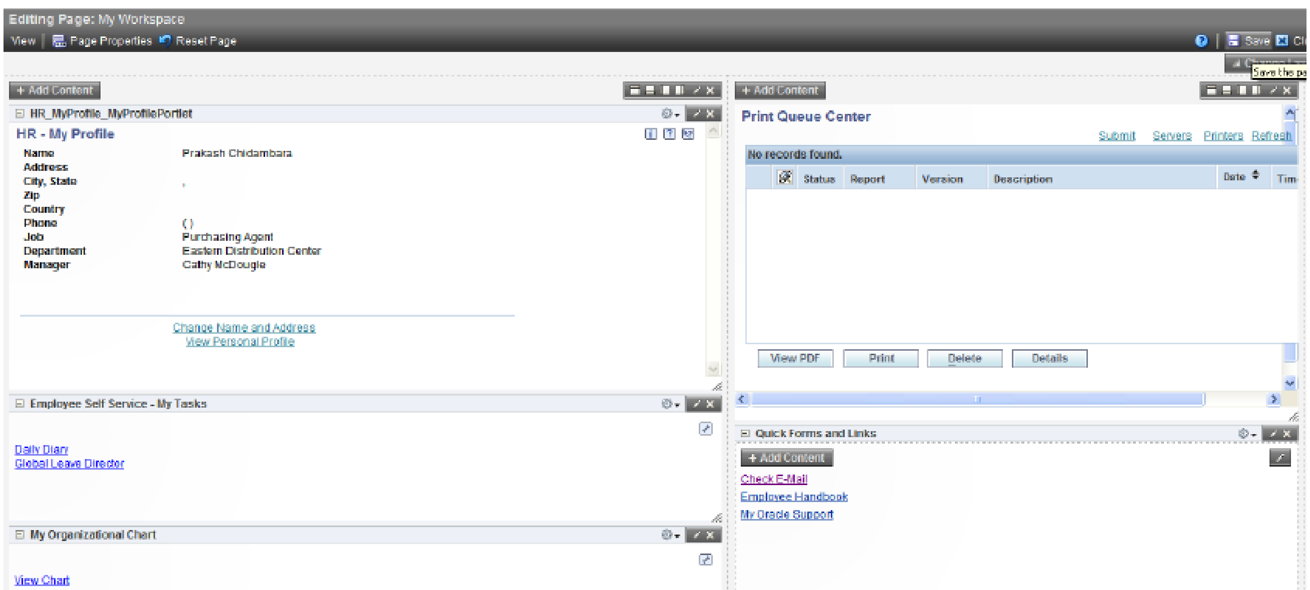
9. To remove heading of the *Print Queue Center* portlet, click on the edit button on the portlet, and then select the *Display Options* tab and uncheck *Display Header* as shown below.

10. To change the heading of the *Movable Box* portlet follow these steps.

a. Click on the *Edit* button on the Movable Box portlet.



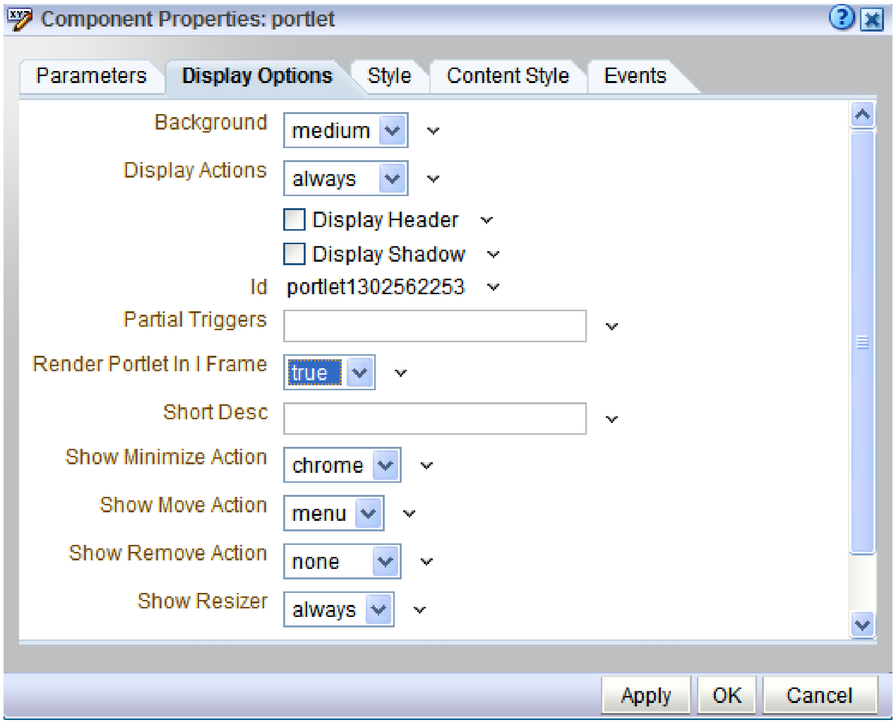
b. Set Text as *Quick Forms and Links*.



11. Save the changes made to the portal page.

8.7.1 Required WebCenter EnterpriseOne Portlets Setup

For EnterpriseOne portlets to work on WebCenter, the property *Render Portlet in I Frame* which is available on the *Display Options* of Component properties should be set to true. To set the property click on the edit button of the portlet and select the *Display Options* tab. Set the property *Render Portlet in I Frame* to true as shown in the image below.


Component Properties: portlet
Parameters
Display Options
Style
Content Style
Events
Background
medium
Display Actions
always
Display Header
Display Shadow
Id
portlet1302562253
Partial Triggers
Render Portlet In I Frame
true
Short Desc
Show Minimize Action
chrome
Show Move Action
menu
Show Remove Action
none
Show Resizer
always
Apply
OK
Cancel

9 Building Portal Pages for WebSphere

This chapter contains the following topics:

- Section 9.1, "Creating and Customizing a Theme"
- Section 9.2, "Creating a Buyer Self-Service Page"
- Section 9.3, "Creating a Customer Self-Service Page"
- Section 9.4, "Creating an Employee Self-Service Portal Page"
- Section 9.5, "Creating a Supplier Self-Service Page"
- Section 9.6, "Creating a My Workspace Portal Page"

IBM® WebSphere® Portal consists of middleware applications (called portlets), mashups, and development tools for building and managing secure business-to-business (B2B), business-to-consumer (B2C), and business-to-employee (B2E) portals. Web portals allow partners, employees and customers to choose their user experience, with personalized applications based on role, context, actions, location, preferences and team collaboration needs.

A portal is a Web site that provides users with a single point of access to Web-based resources by aggregating those resources in one place and by requiring that users log in only to the portal itself, and not to each portlet they use. WebSphere Portal can also deliver Web content to WAP-enabled devices, i-Mode phones, Smart phones, and to various Web browsers.

As an administrator, you can customize WebSphere Portal to meet the needs of your organization, users, and user groups. You can adapt the look and feel of the portal to fit the standards of your organization and to customize page content for users and groups in accordance with business rules and user profiles. Users, such as business partners, customers, or employees, can further customize their own views of the portal. Users can add portlets to pages and arrange them as they want and control portlet color schemes. By aggregating portlets in one place and giving users the power to customize their own desktops, WebSphere Portal gives users a means for doing business efficiently and with high satisfaction.

Portlets are central to WebSphere Portal. WebSphere Portal ships a rich set of standard portlets, including portlets for displaying syndicated content, transforming XML, and accessing search engines and Web pages.

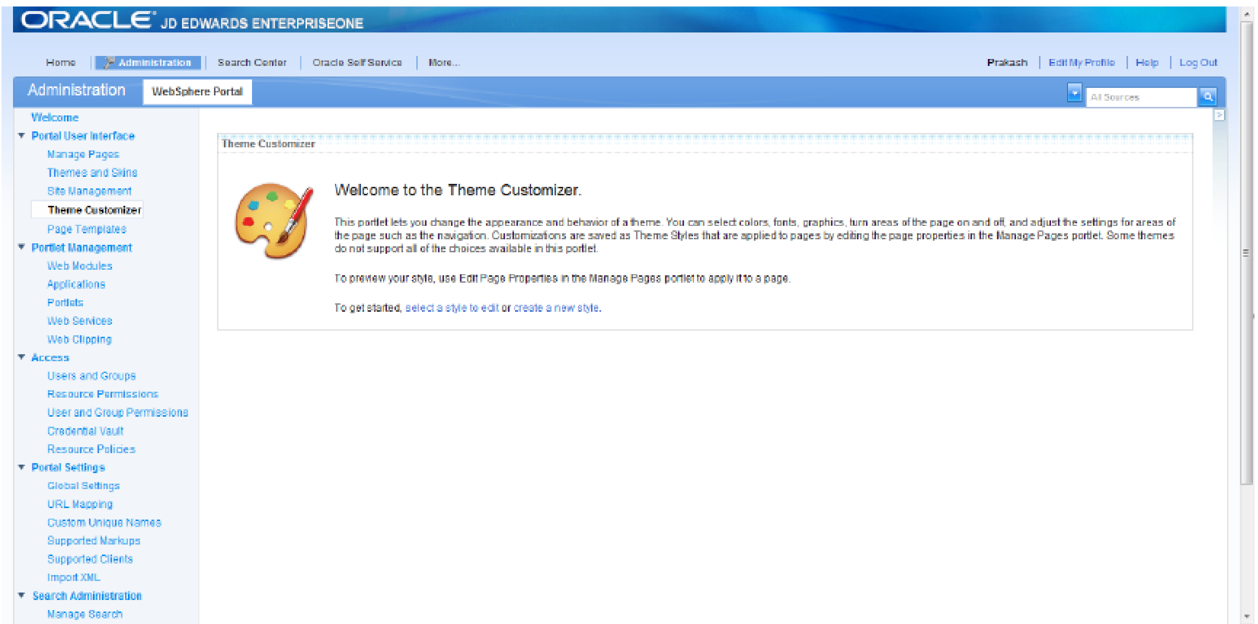
EnterpriseOne provides FDA portlets and Configurable HTML portlets. Configurable portlets enable you to initialize a portlet to an existing portlet type or create a new portlet definition. In addition, when you initialize a configurable portlet, you define permissions to determine the type of access users have to the configurable portlet. You can grant either View or View, Config access. View permissions allow users to use a configurable portlet, but prevent them from modifying the definition of the portlet.

View, Config permissions allow users to modify the definition and the permissions of a portlet. A user who has View, Config permissions basically has the same permissions of a system administrator. Therefore, you should carefully consider the users to which you grant View, Config permissions.

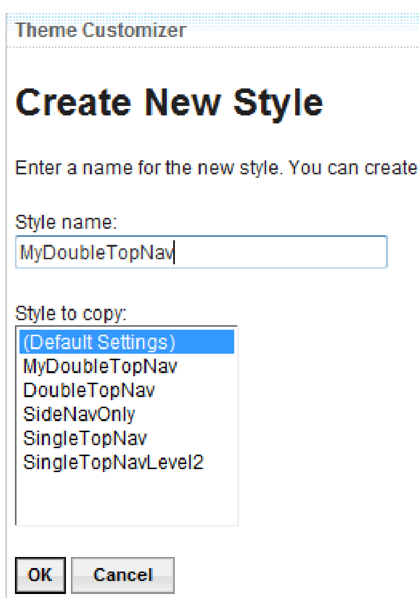
9.1 Creating and Customizing a Theme

A selection of themes are available to enhance the user experience.

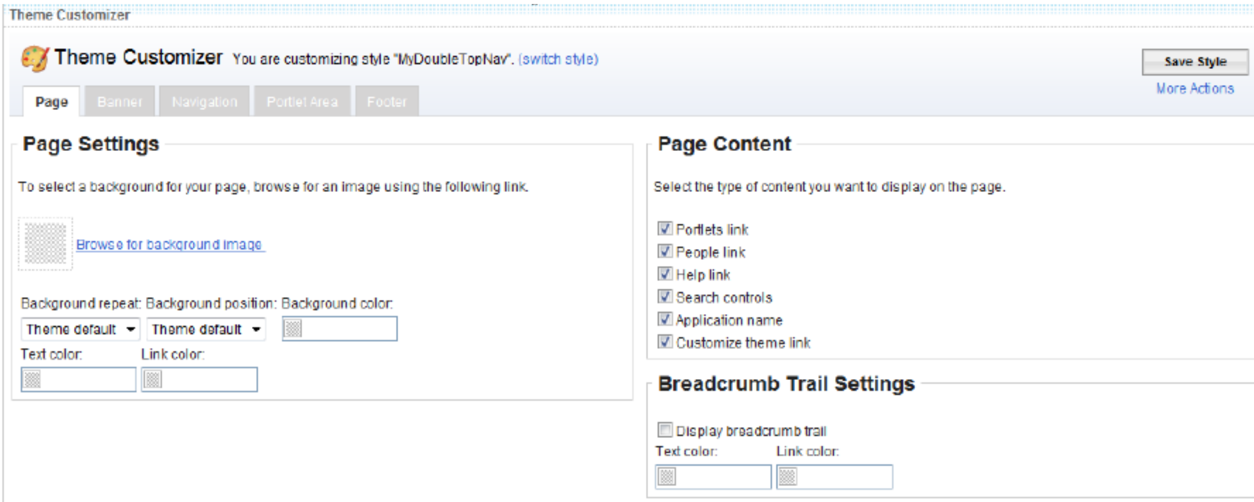
To create a theme:



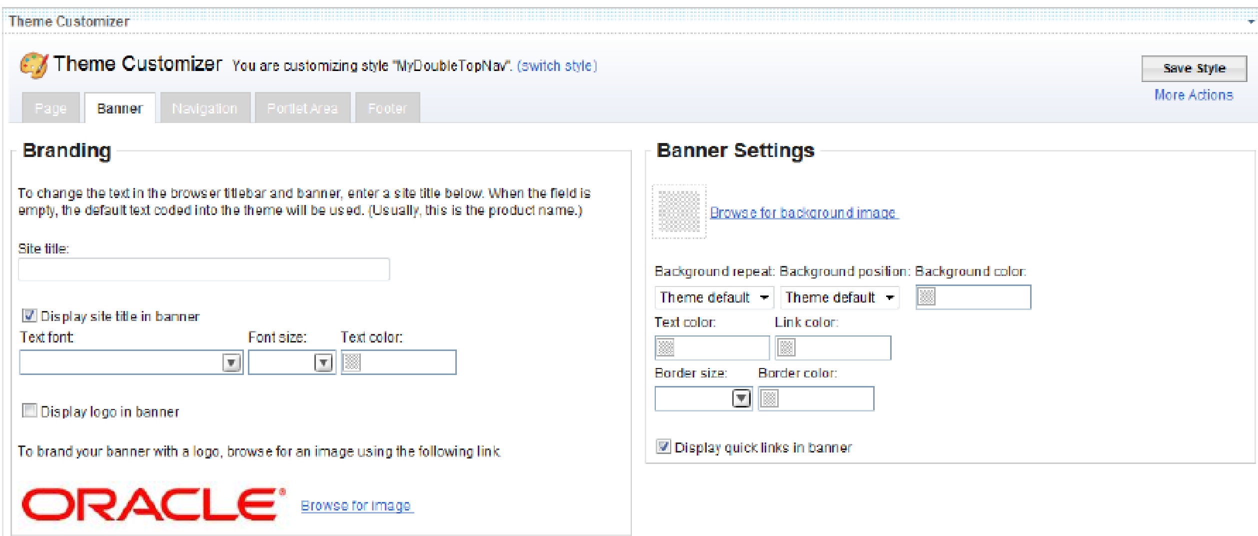
1. Select Theme Customizer and click the "create a new style" link.



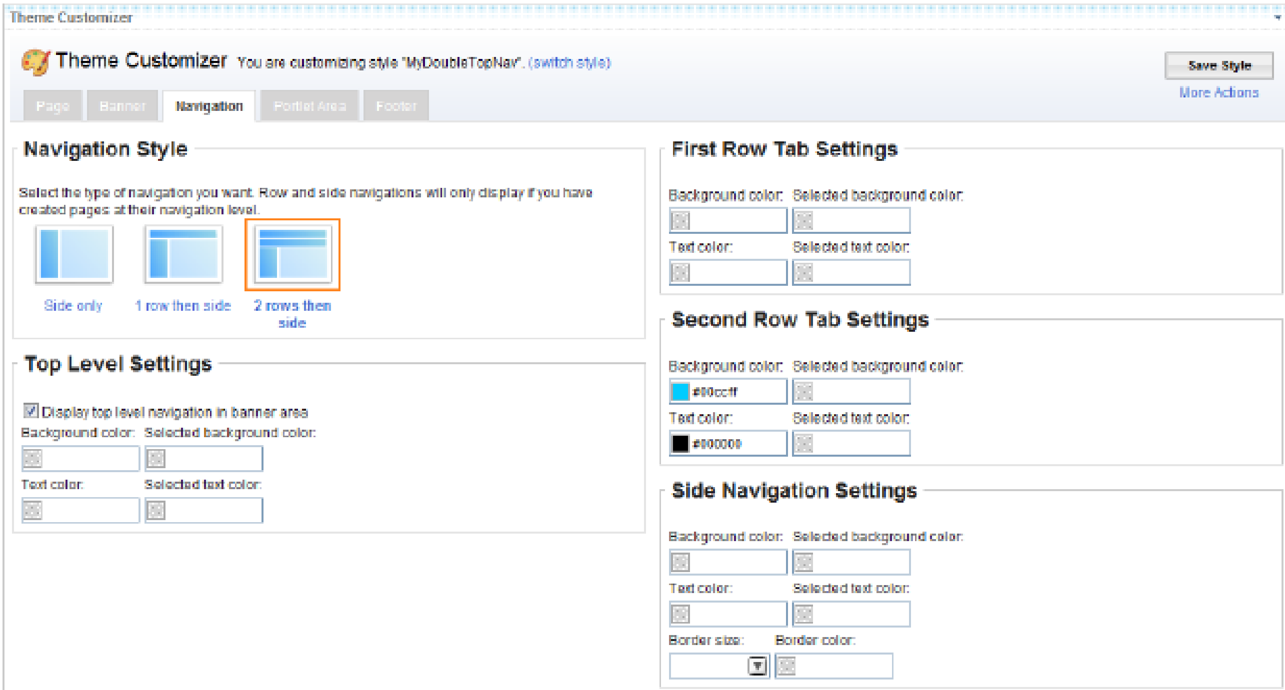
2. Provide a new style name and click the OK button.



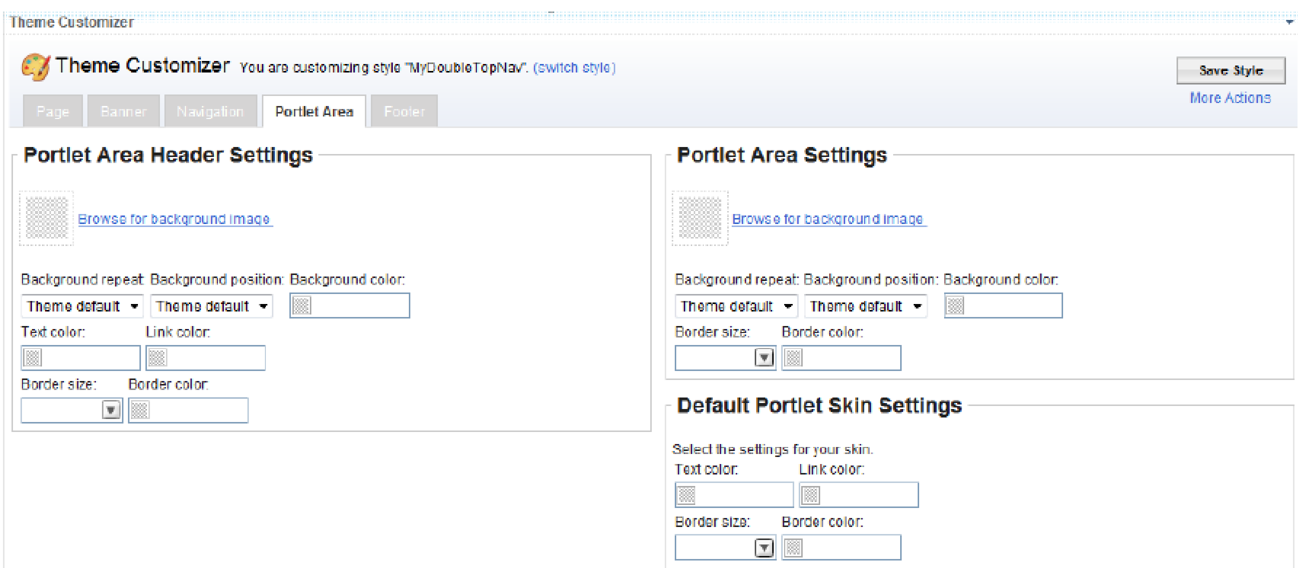
3. Customize the theme for the Page Setting.



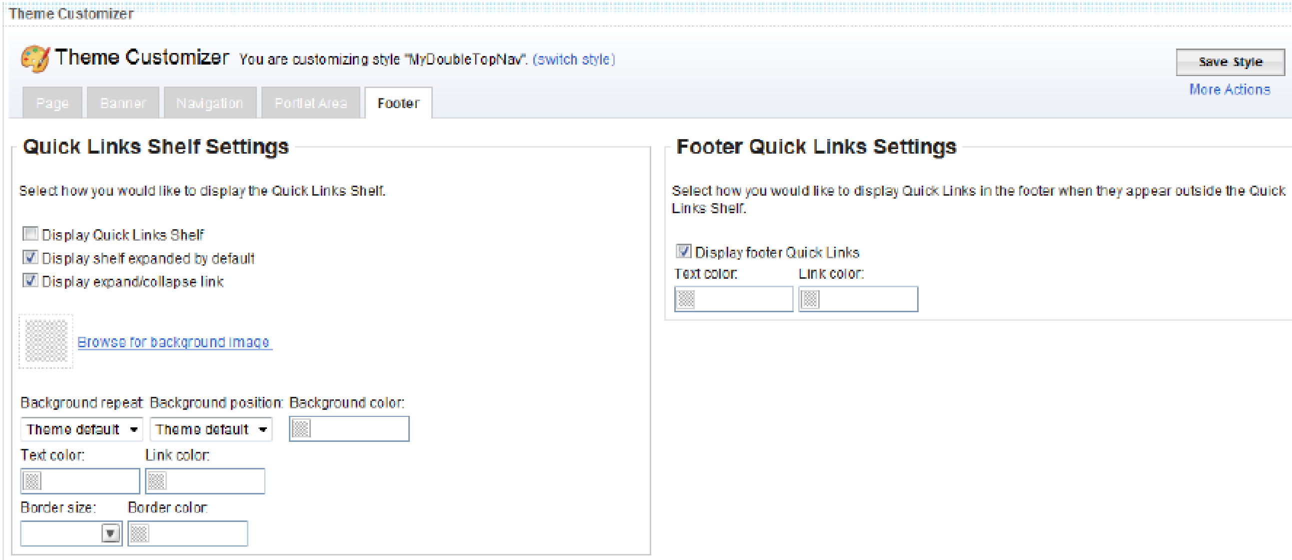
4. Customize the theme for the Banner Setting.



5. Customize the theme for the Navigation Setting.



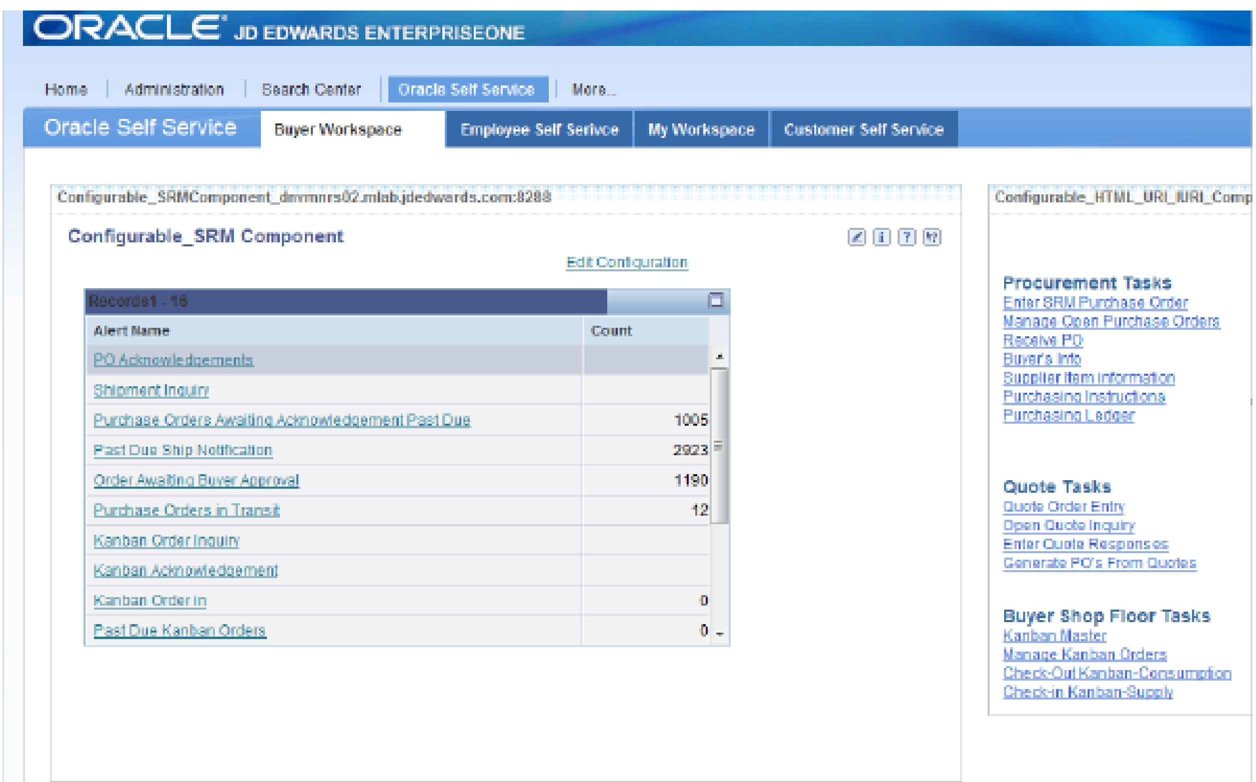
6. Customize the theme for the Portlet Area setting.



7. Customize the theme for the Footer Setting.
8. Click the Save Style button to save the style.

9.2 Creating a Buyer Self-Service Page

Below is the Buyer Workspace portal page that will be created in this section.

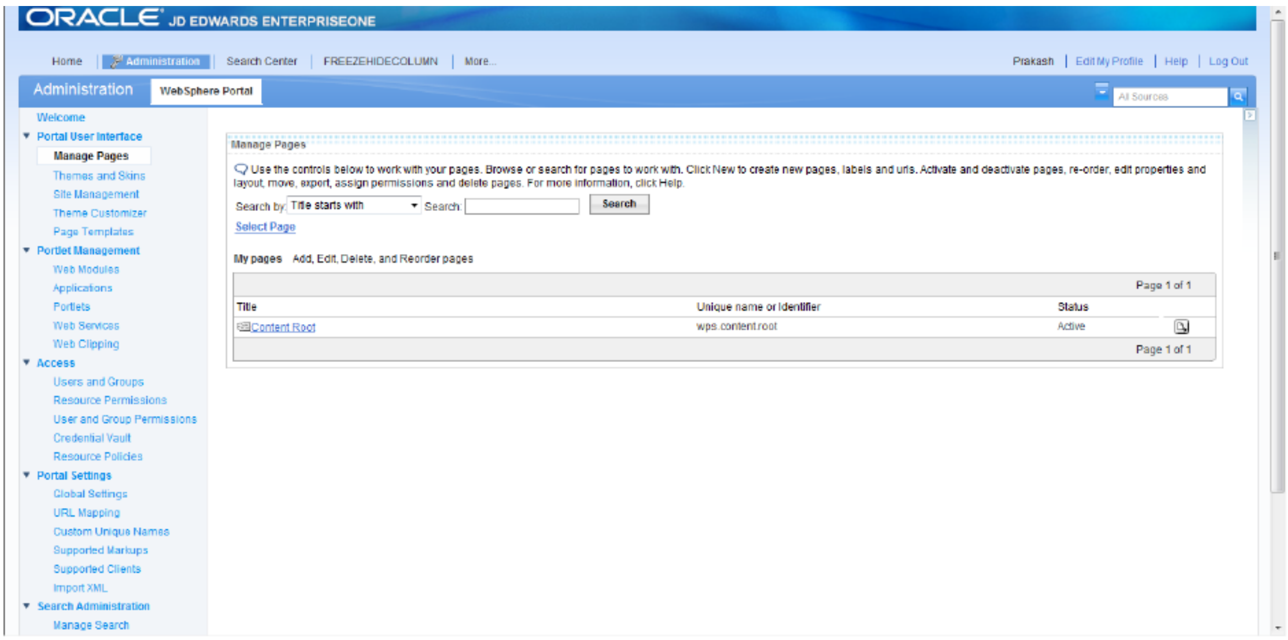


Follow these steps to create the Buyer Workspace page:

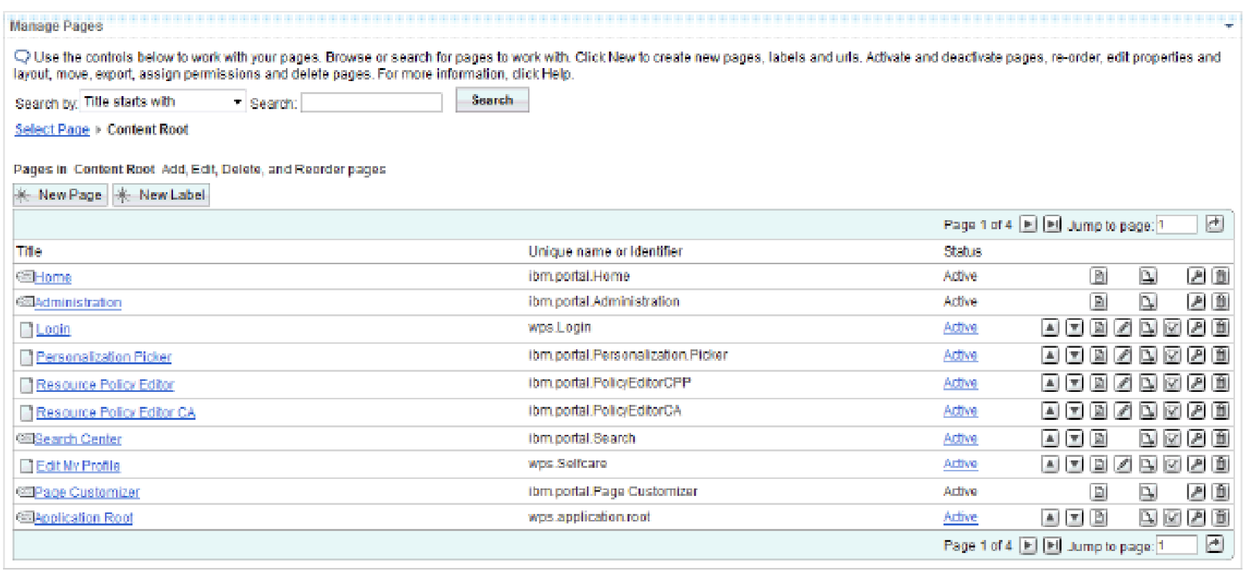
1. Login into the Collaborative Portal using the user name and password provided to you. If you do not have a user name and password, then you will need to register yourself.

   Your user name for the portal you are using must match the user name for the E1 environment that the portlets are running on.

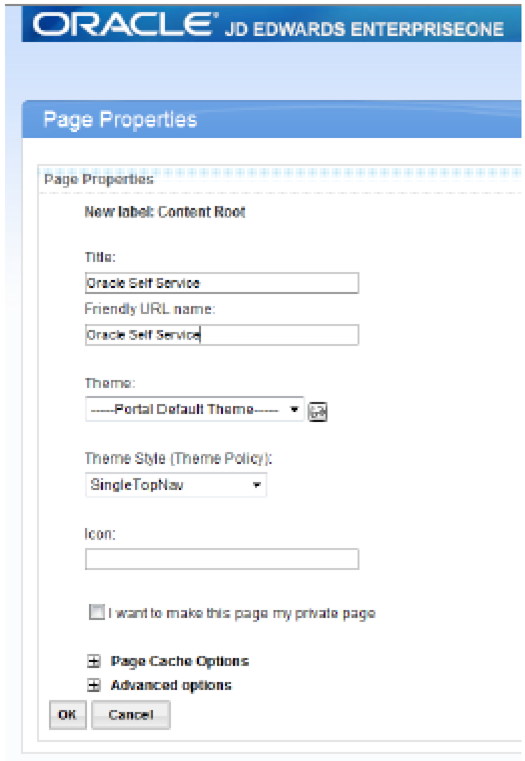
   E.g. User name and password for PY900 is AB1234 so the portal user name and password for the WebCenter/Collaborative Portal running PY900 portlets must be AB1234.



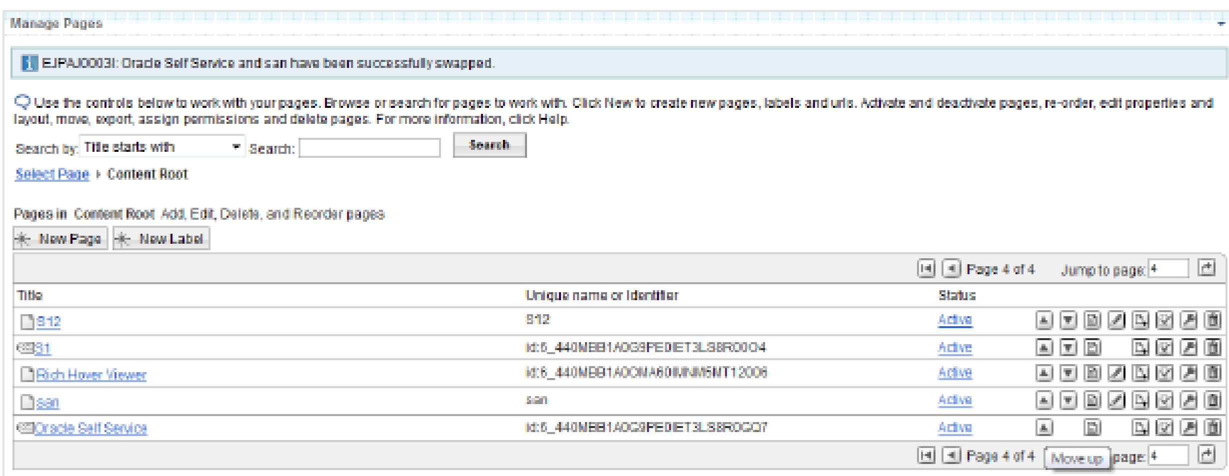
2. Select "Content Root" from Manage Pages present under Administration tab.

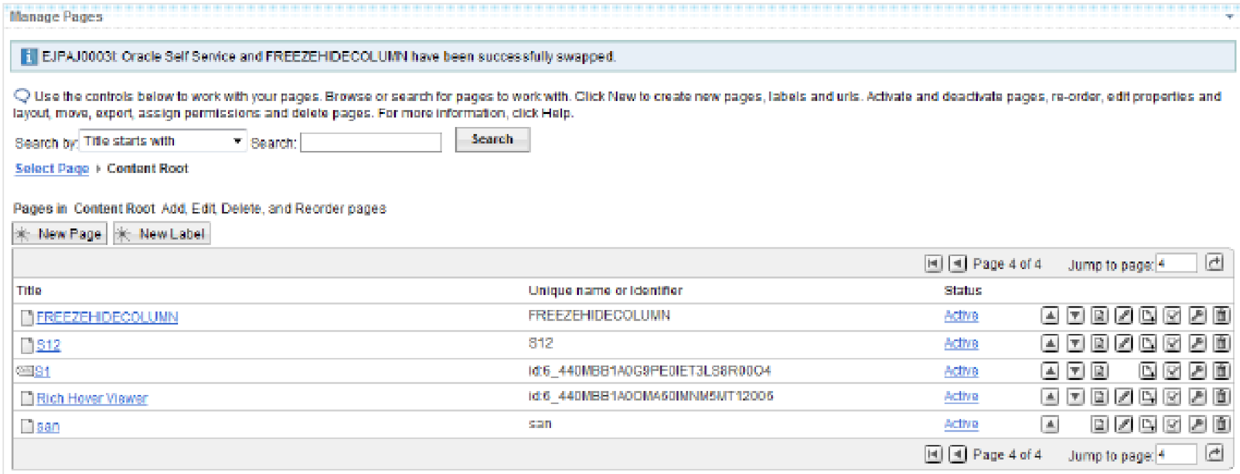


3. Click the "New Label" button.

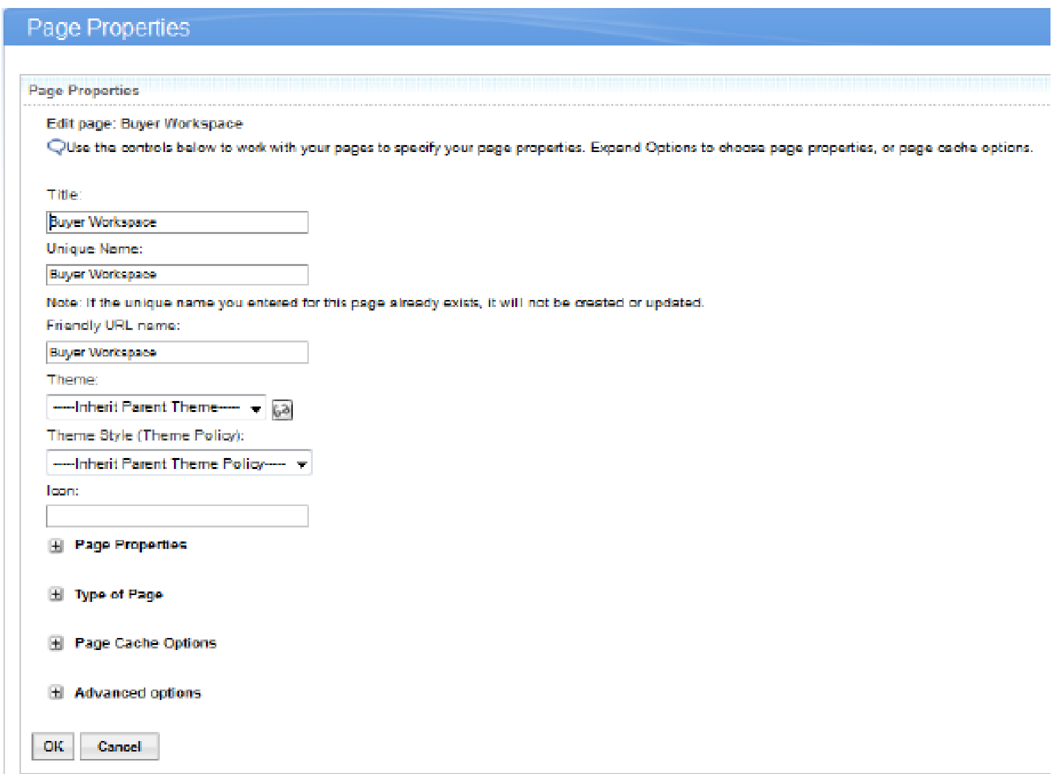


4. Fill out the Page Properties and click the "OK" button.

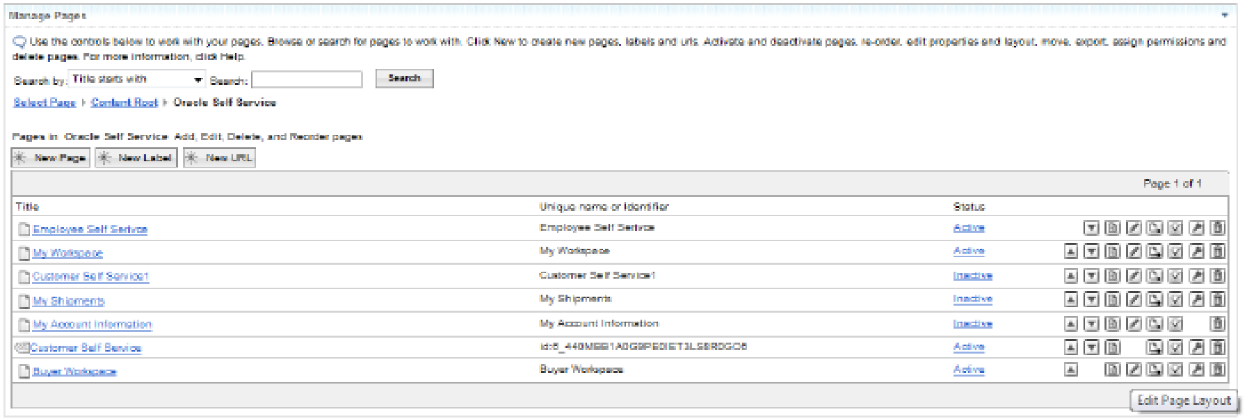




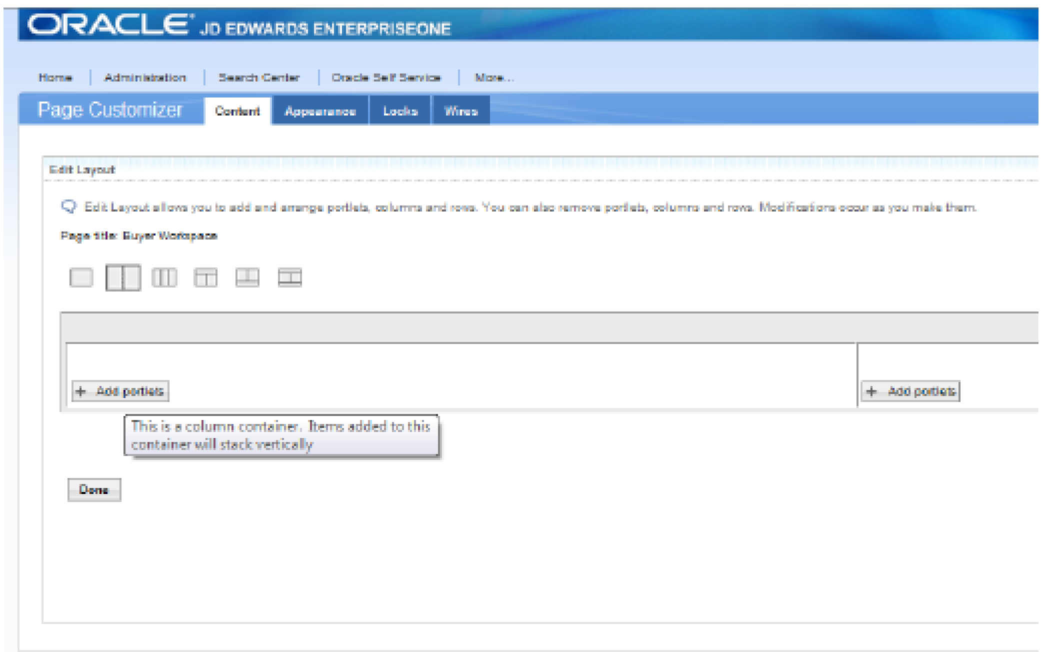
5. If the new label created is not visible in the tabs, the user can make it visible by moving the page created up to the queue so that the created label will be visible in the tabs.



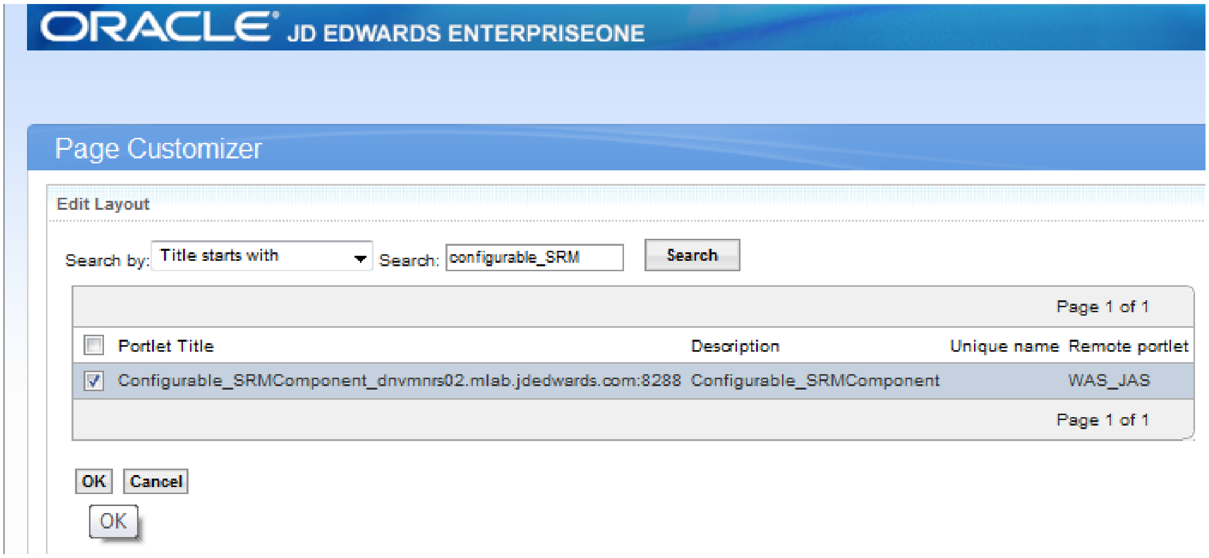
6. Click the "New Page" button and fill in the Page Properties, and then click the OK button.



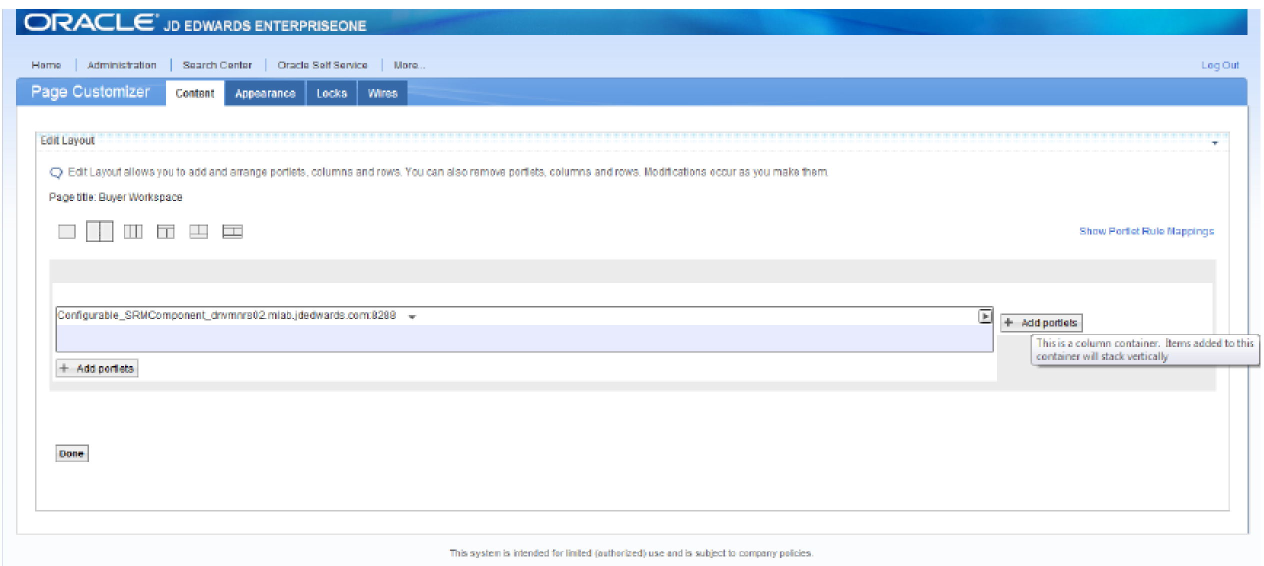
7. Click the “Edit Page Layout” button.



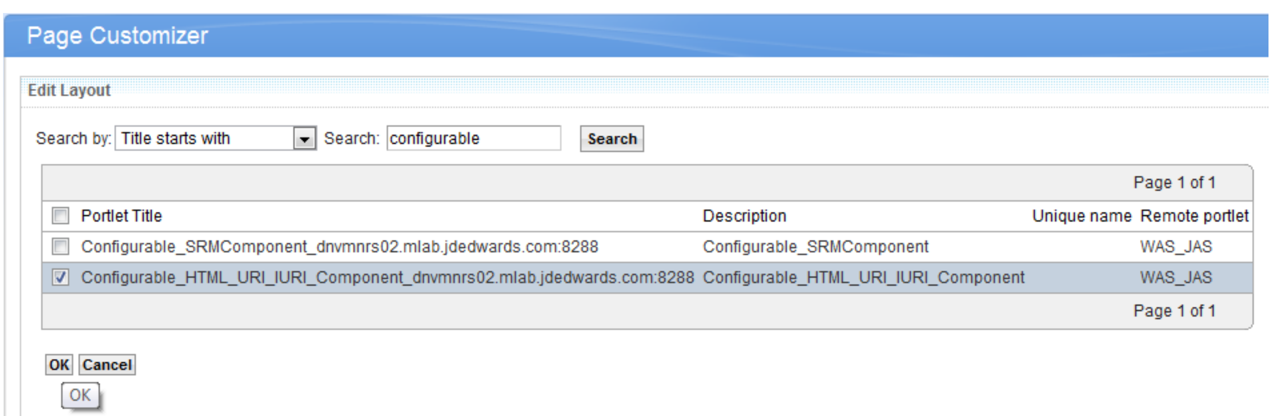
8. Select the second layout and click the “Add Portlets” button on the left pane.



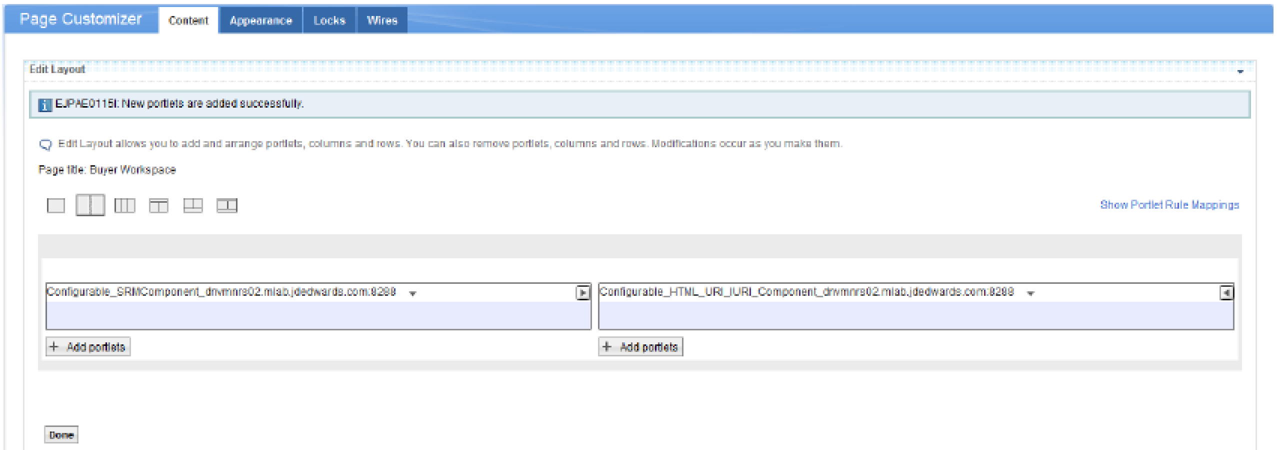
9. To add the Configurable_SRMComponent portlet to the left pane, search for the string "Configurable_SRMComponent" to find the list of Configurable_SRMComponent portlets available, then select it and click the OK button.



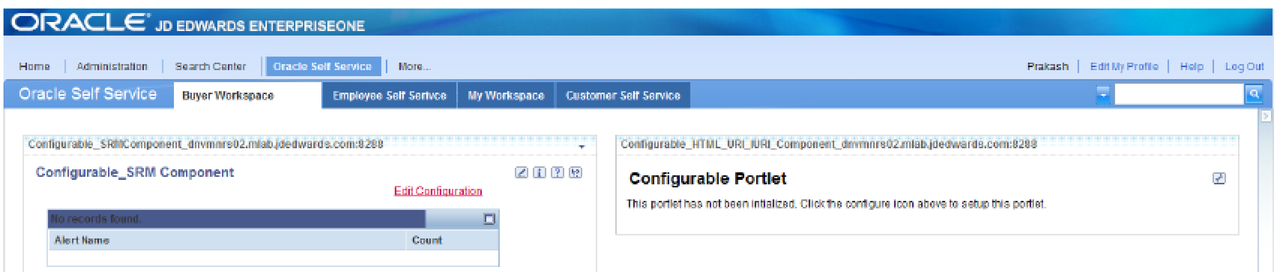
10. Click the "Add Portlets" button on the right pane.



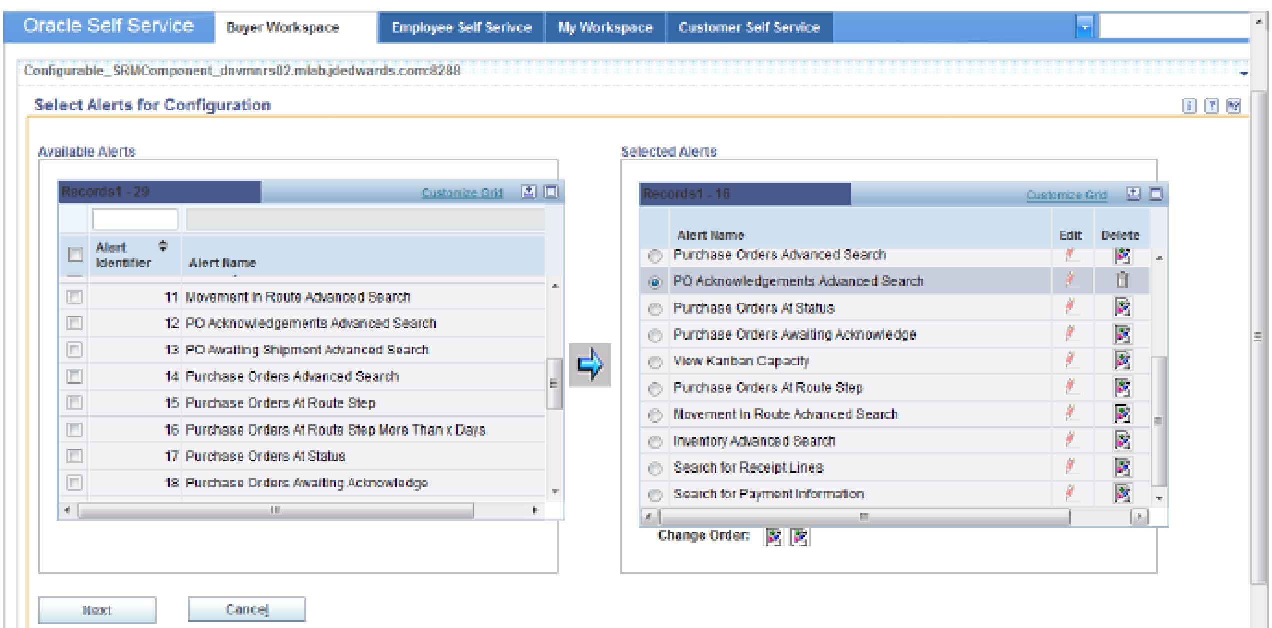
11. To add the Configurable_HTML_URI_IURI_Component portlet to the right pane search for the string “Configurable_HTML_URI_IURI_Component” to find the list of Configurable_HTML_URI_IURI_Component portlets available, select it and click OK button.

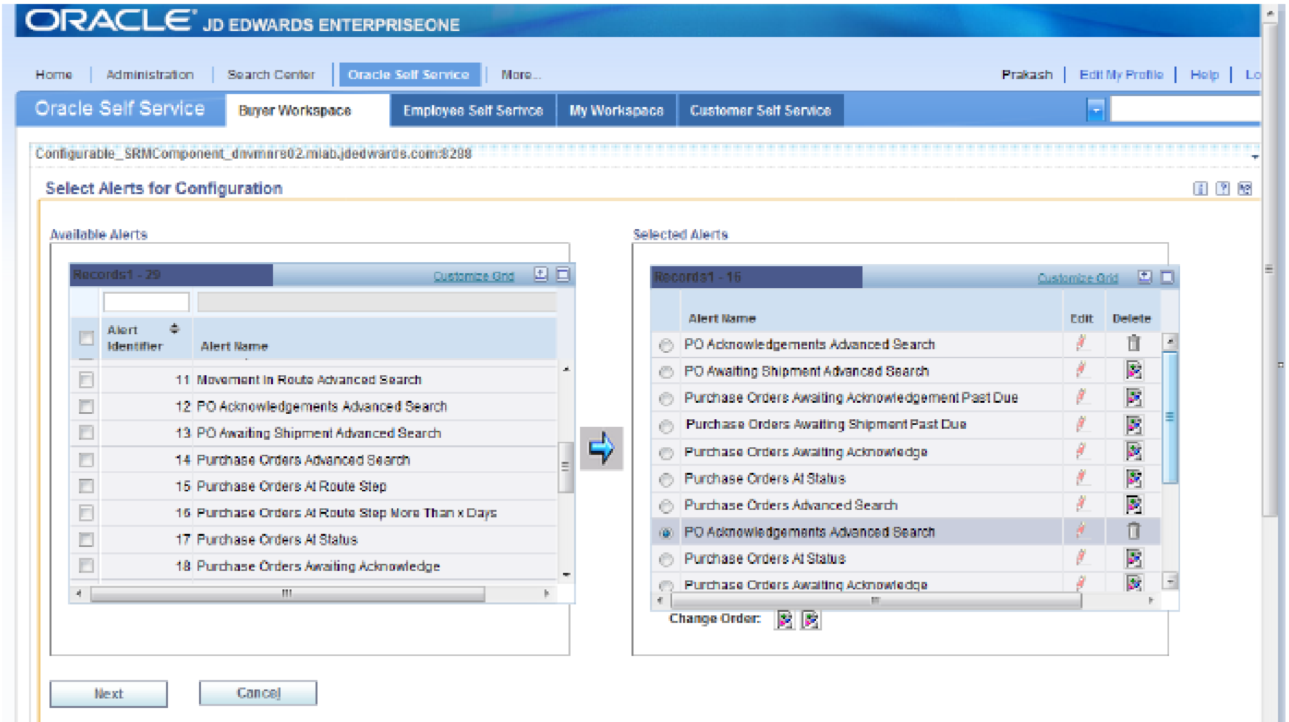


This screen is presented after clicking Done:



12. Click the “Done” button after adding the two portlets and select Buyer Workspace tab from Oracle Self Service and click the Edit Configuration link.





13. Add the alerts from the Available Alerts grid to the Selected Alerts grid.
14. Click on "Next". as shown in the images below. This will allow the user to override all the alert names as desired.

    The images below display the alert name overrides.

Figure 9–1 PO Acknowledgements Advanced Search Alert

Figure 9–2 PO Awaiting Shipment Advanced Search Alert

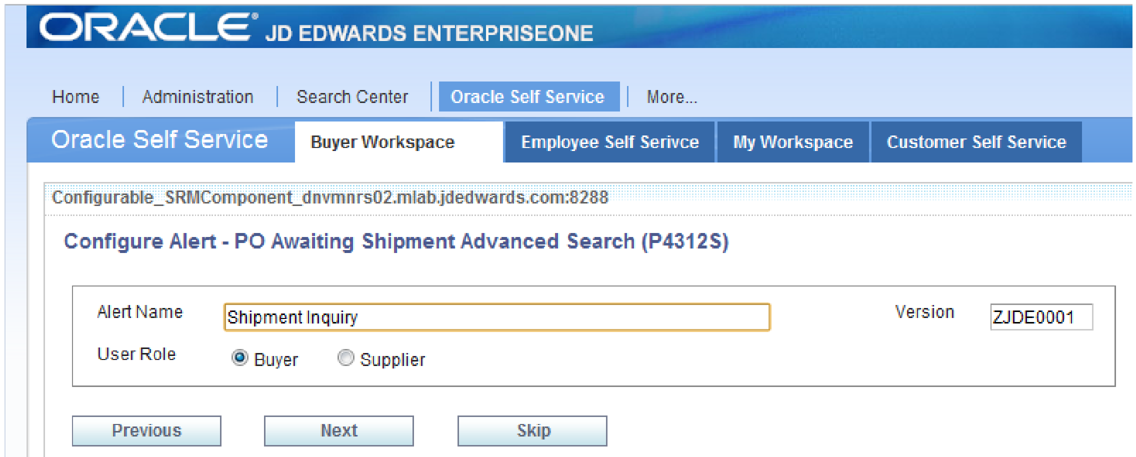


Figure 9–3 Purchase Orders Awaiting Acknowledgement Past Due Alert

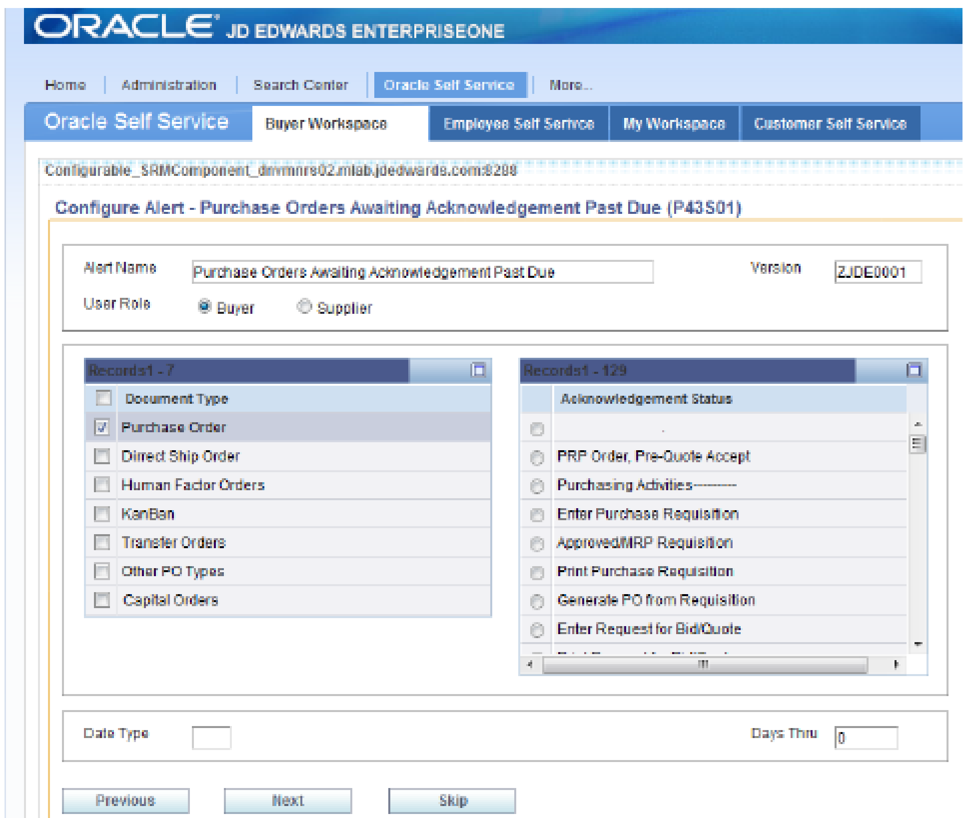


Figure 9–4 Purchase Orders Awaiting Shipment Past Due Alert

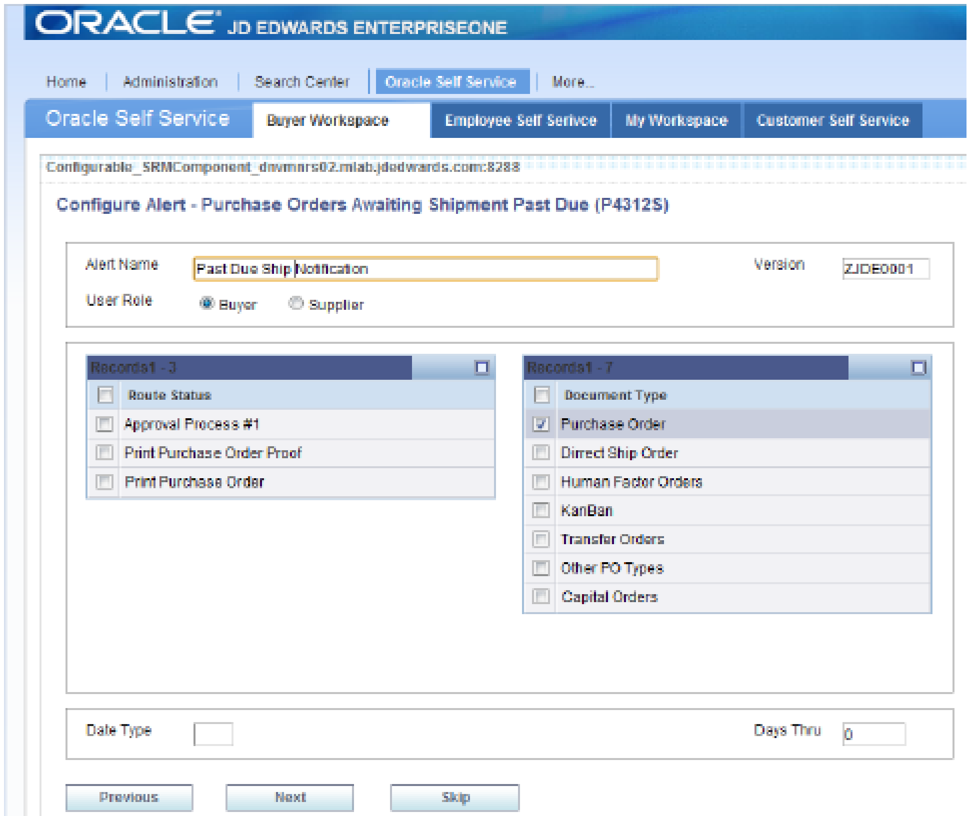


Figure 9–5 Purchase Orders At Status Alert

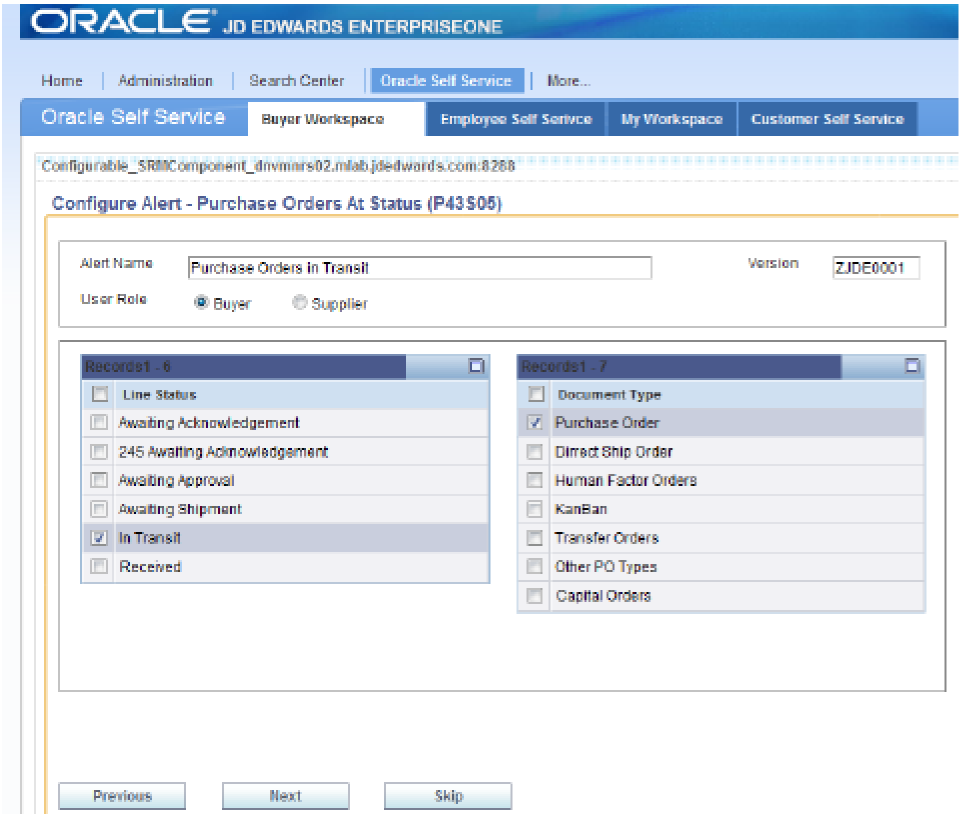


Figure 9–6 Purchase Orders Advanced Search Alert

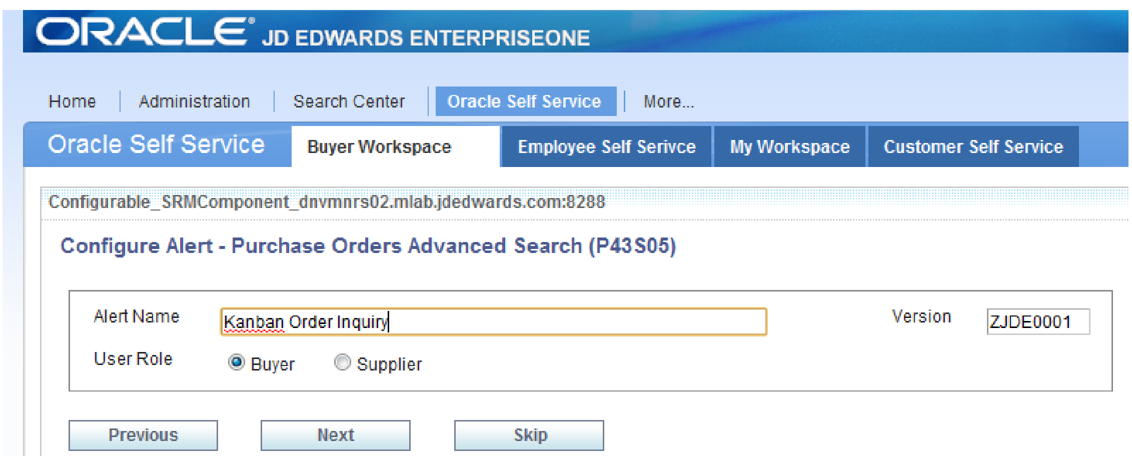


Figure 9–7 PO Acknowledgements Advanced Search Alert

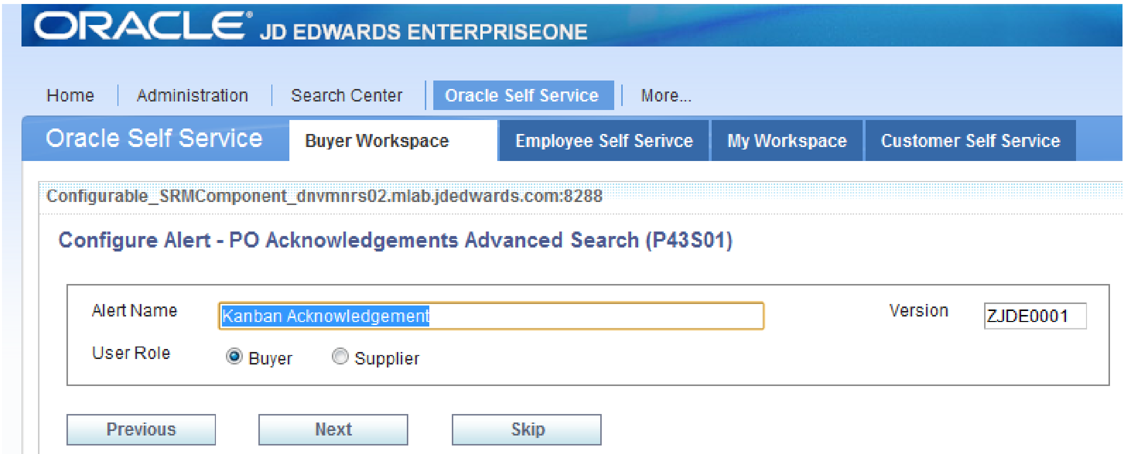


Figure 9–8 Purchase Orders At Status Alert

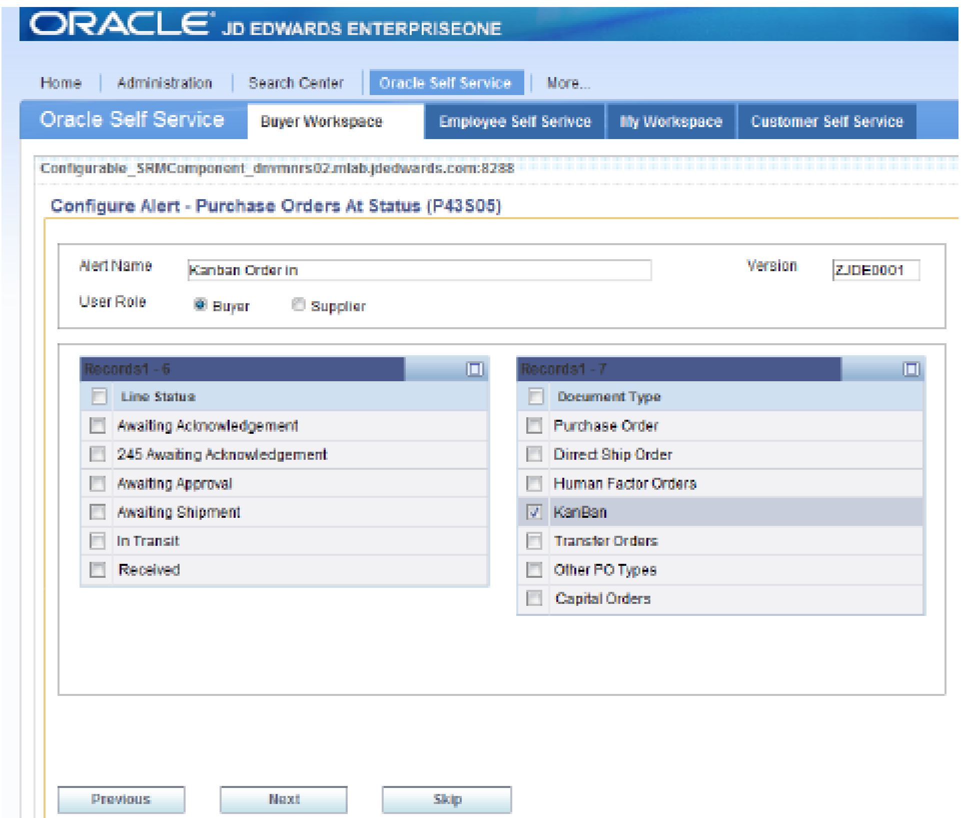


Figure 9–9 Purchase Orders Awaiting Acknowledge Alert

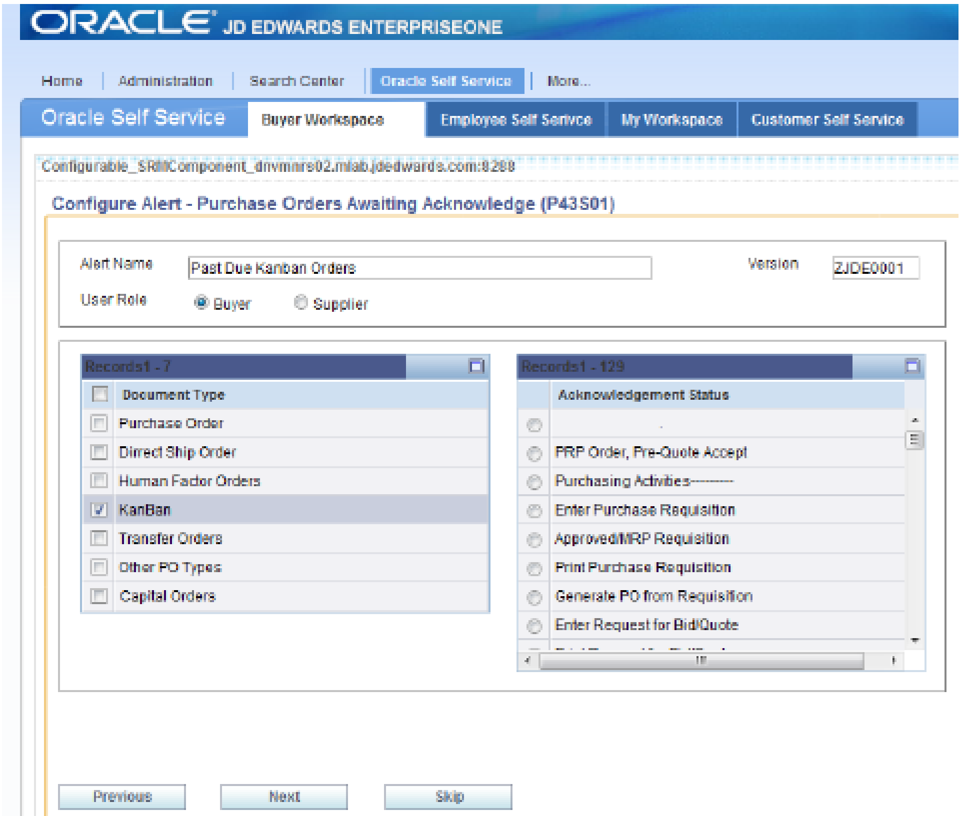


Figure 9–10 View Kanban Capacity Alert

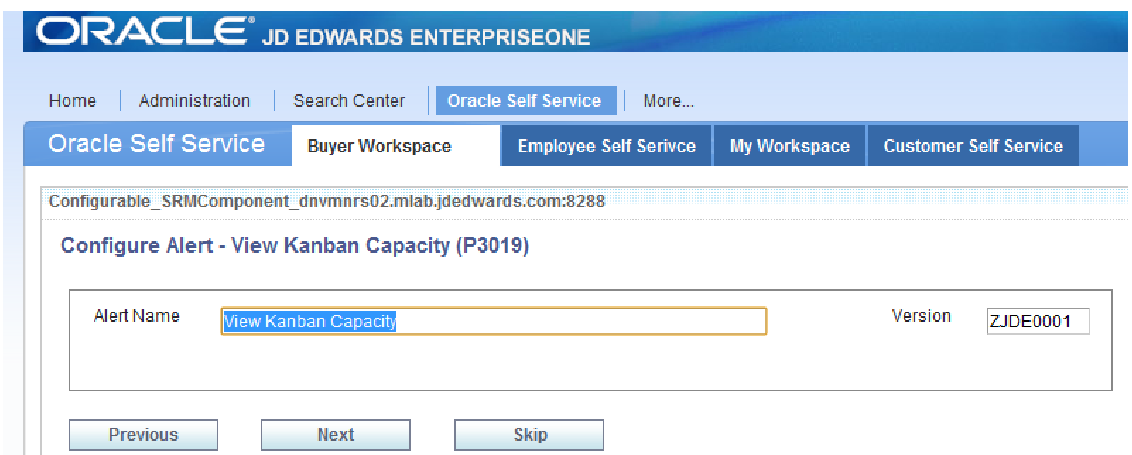


Figure 9–11 Purchase Orders At Route Step Alert

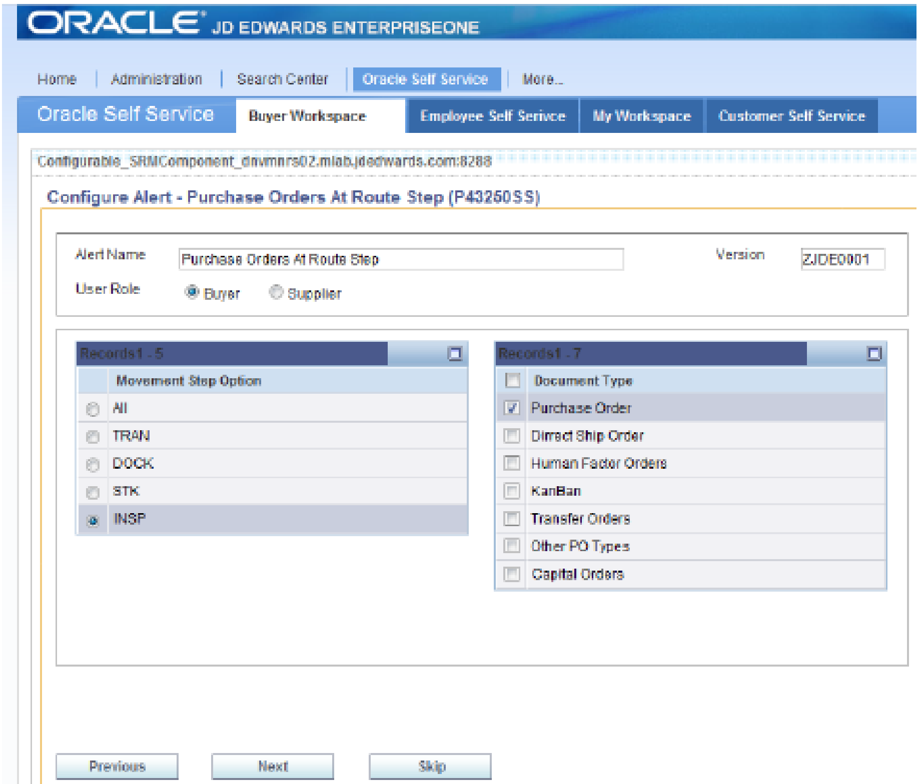


Figure 9–12 Movement in Route Advanced Search Alert

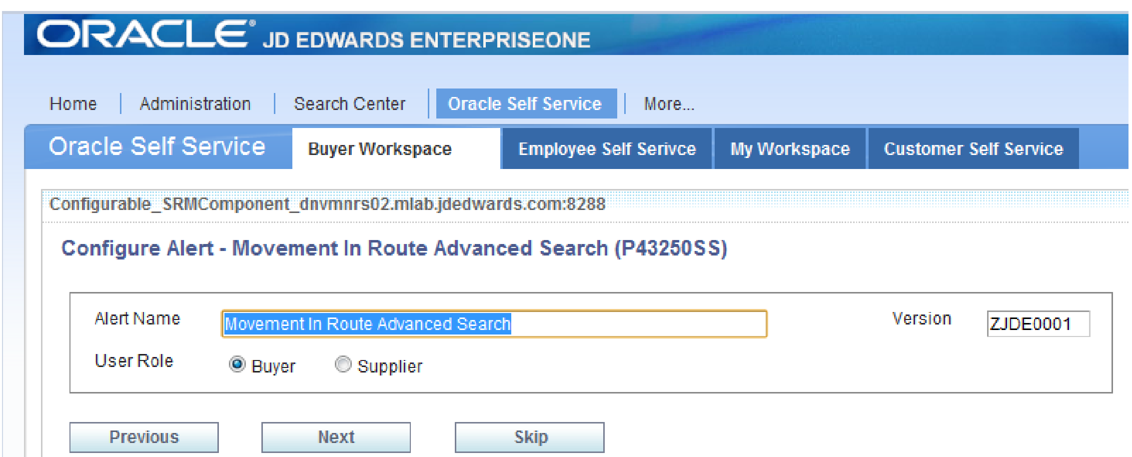


Figure 9–13 Inventory Advanced Search Alert

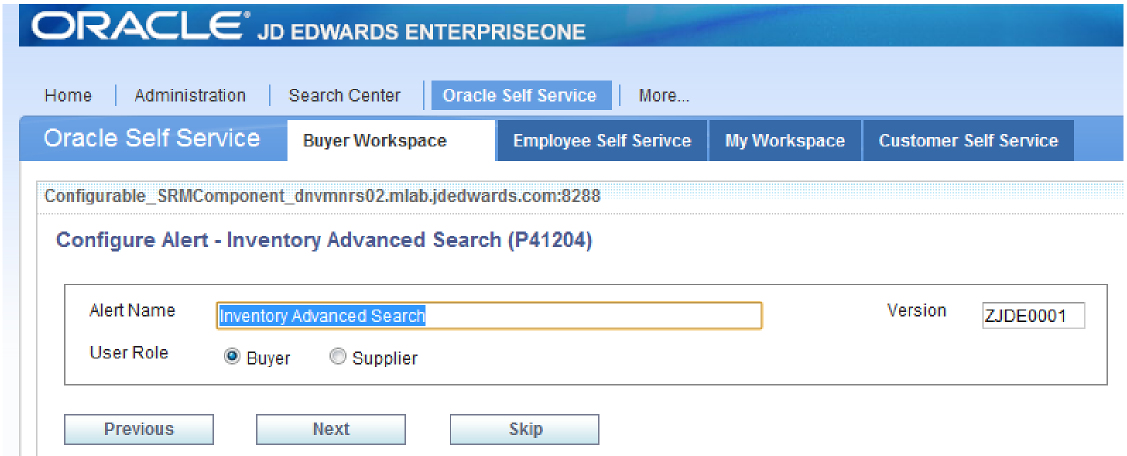


Figure 9–14 search for Receipt Lines Alert

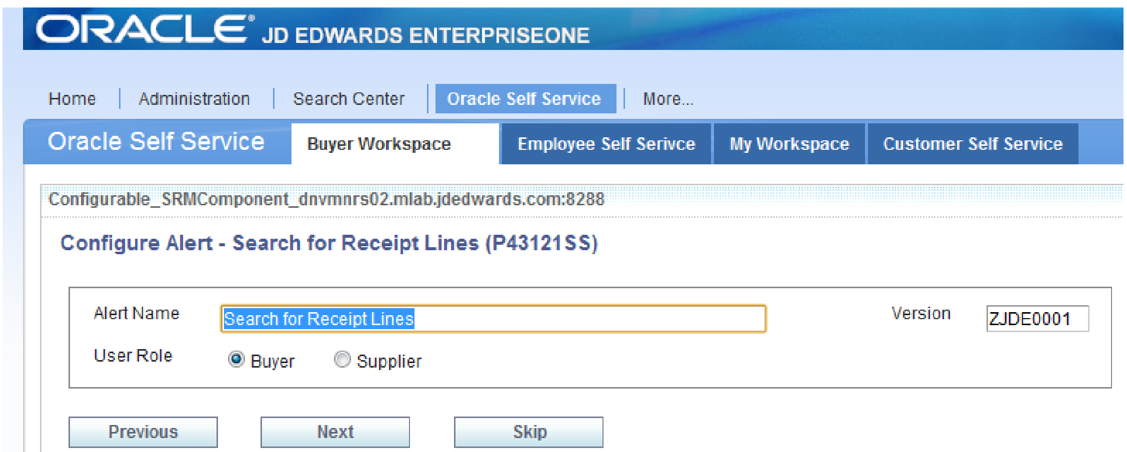
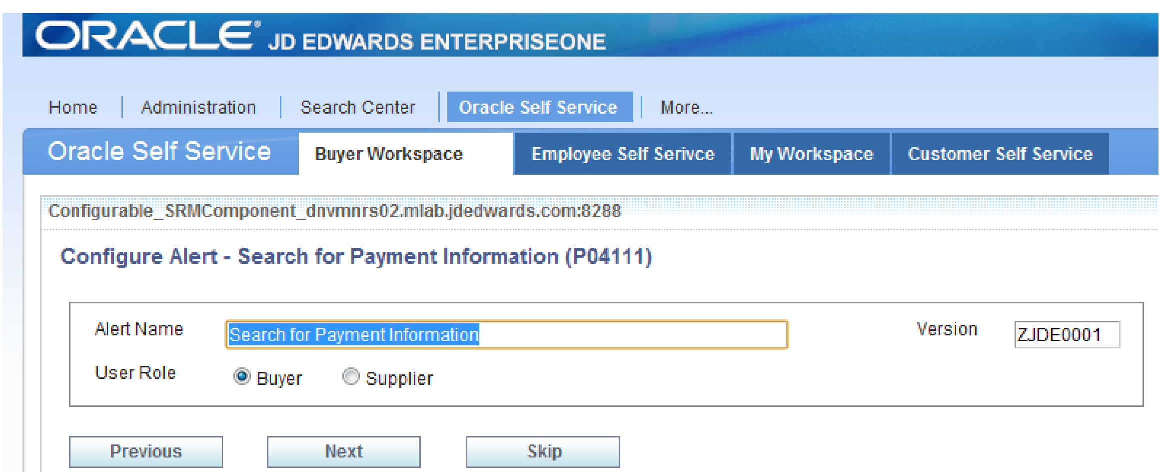
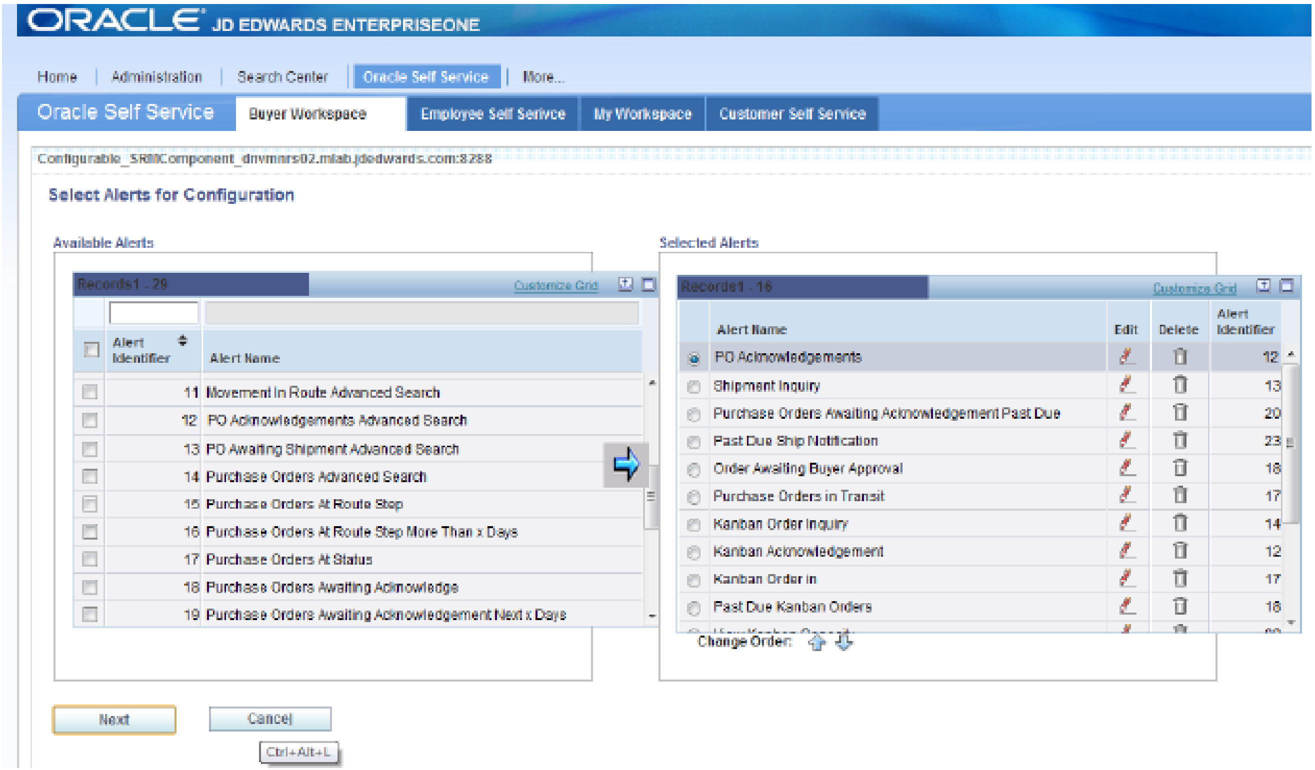
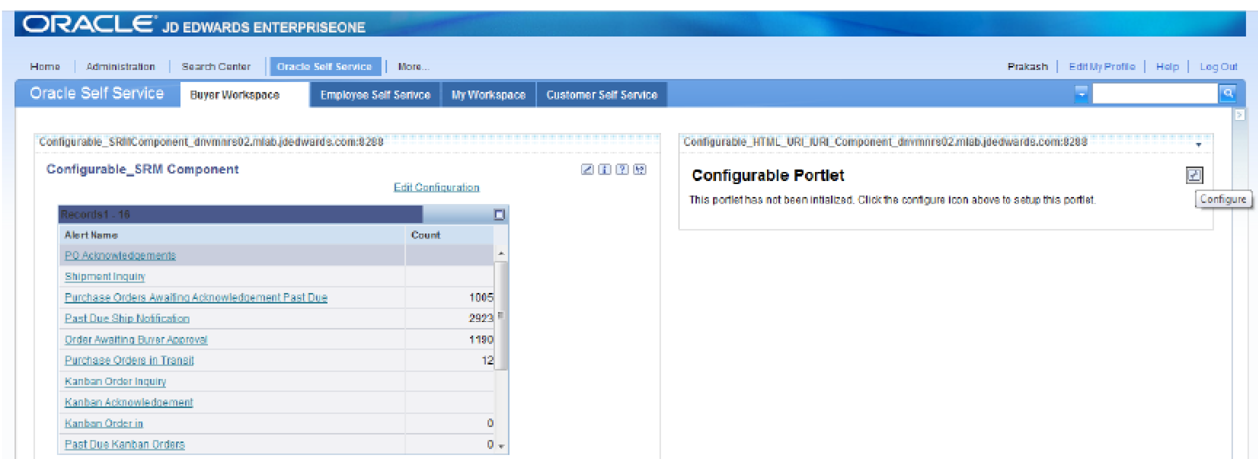


Figure 9–15 Search for Payment Information Alert

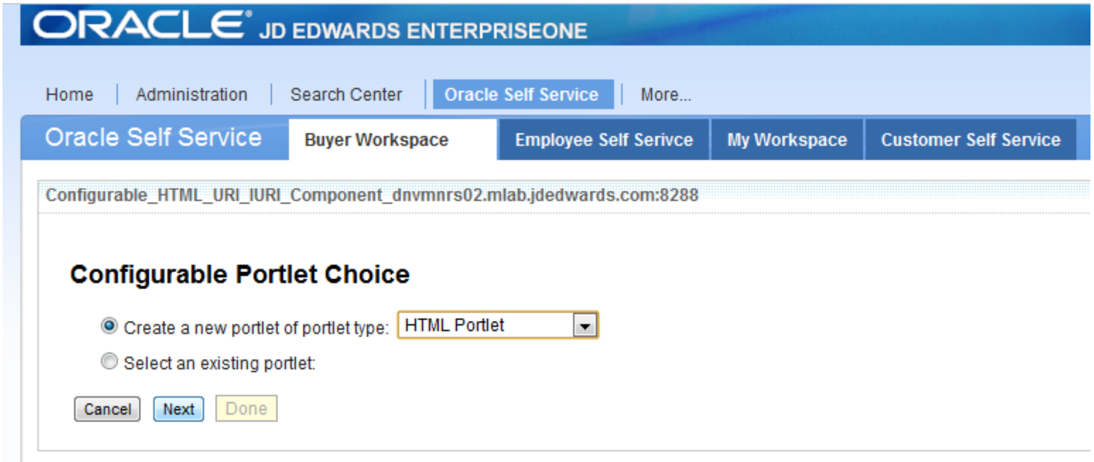




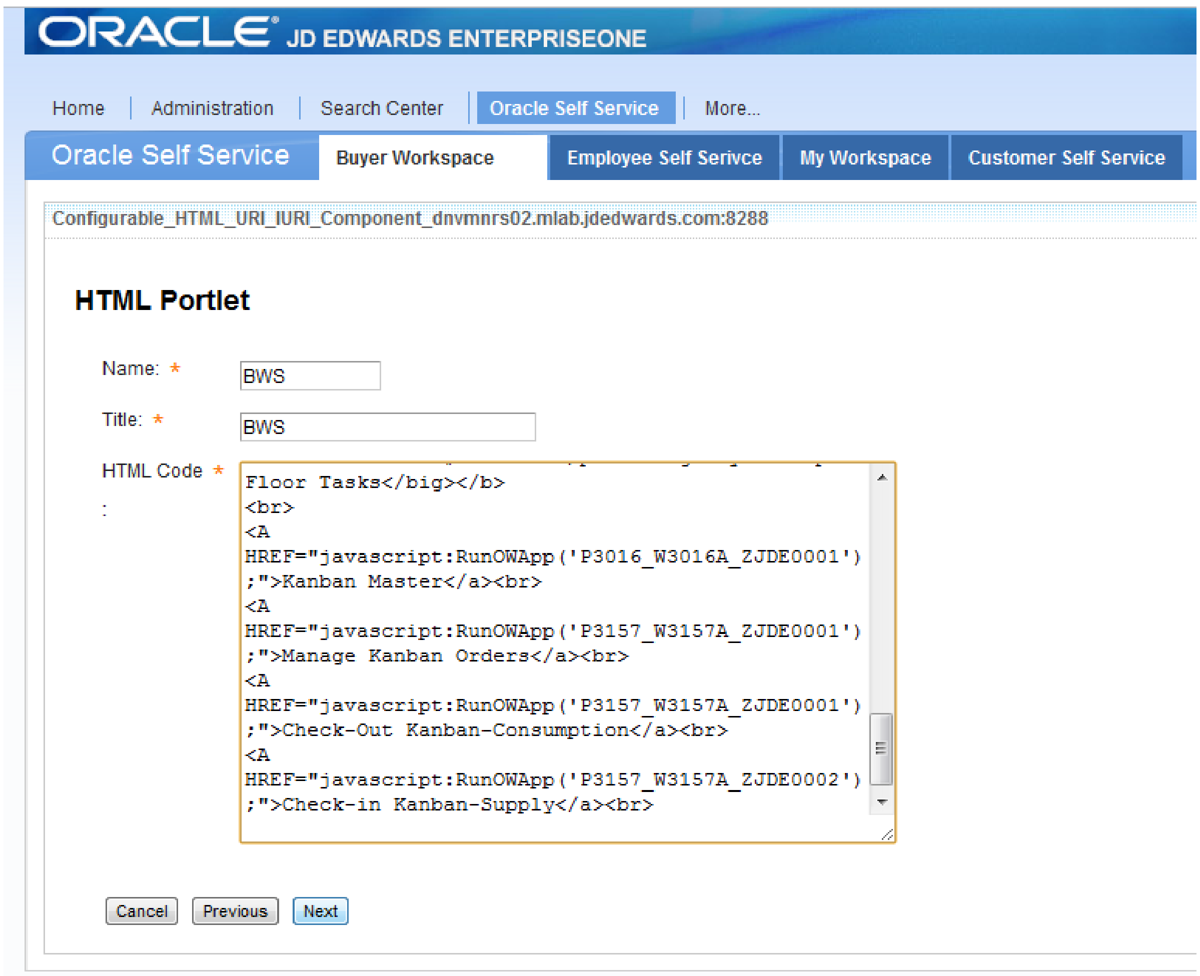
15. Click "Cancel" button provided to exit from the configuration screen.



16. Click the "Configure" icon on the configurable portlet.



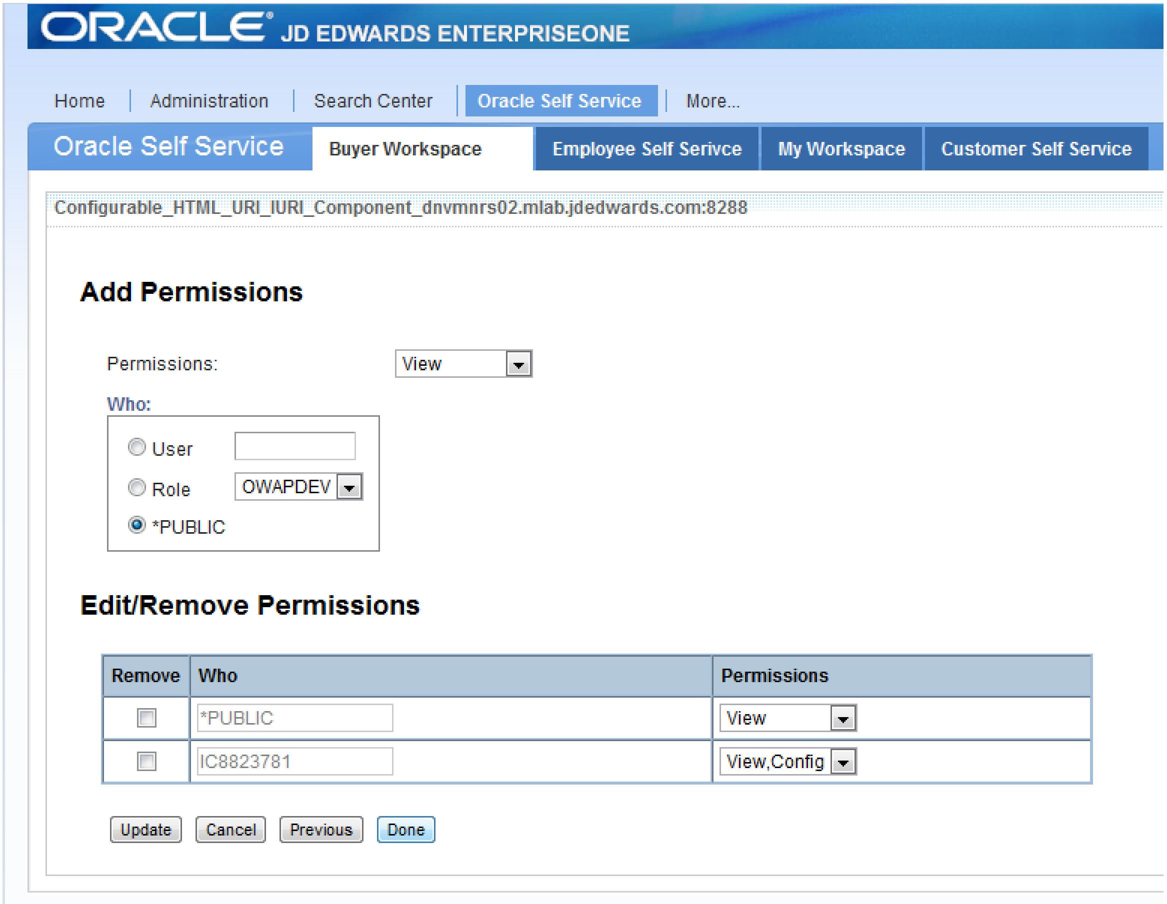
17. Select HTML Portlet from the available list and click “Next”.



18. Enter the Name as “BSS” and Title as “BSS” and paste following text in “HTML Code” text area and click “NEXT” button.

```
<P><Font Color="#336699"></p><b><big>Procurement Tasks</big></b><br>
<A HREF="javascript:RunOWApp('P4310_W4310I_ZJDE0001');">Enter SRM Purchase
Order</a><br>
<A HREF="javascript:RunOWApp('P4310_W4310G_ZJDE0001');">Manage Open Purchase
```

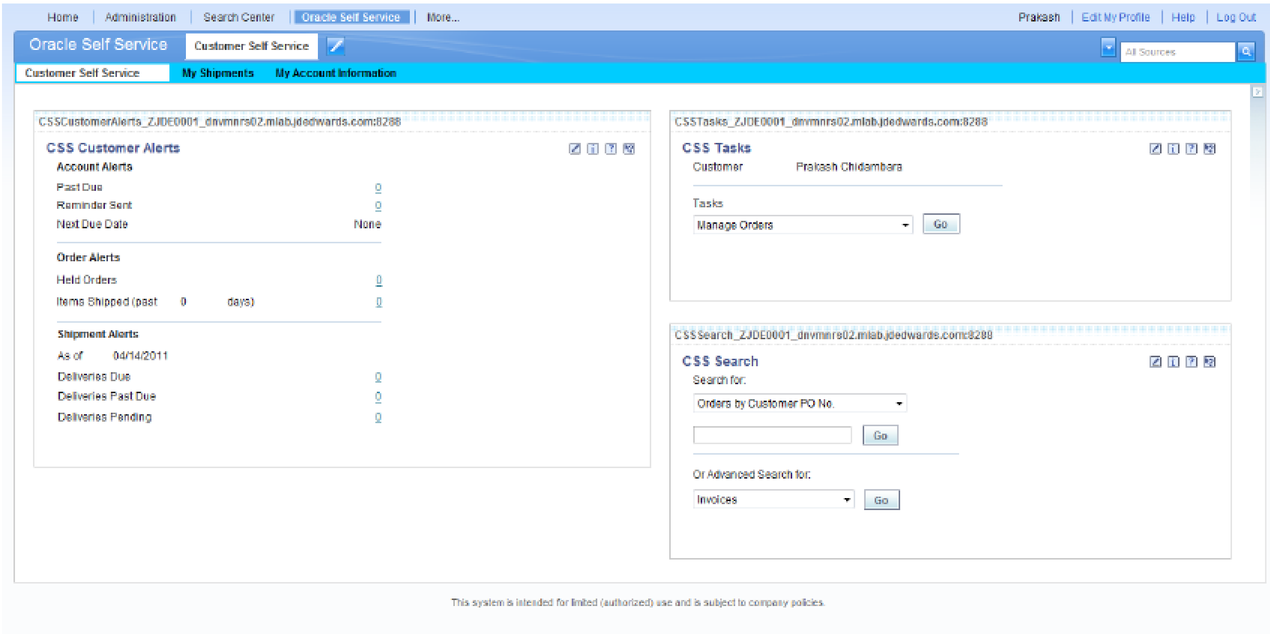
```
Orders</a><br>
<A HREF="javascript:RunOWApp('P4310_W4310I_ZJDE0003');">Receive PO</a><br>
<A HREF="javascript:RunOWApp('P01012_W01012A_ZJDE0005');">Buyer's Info</a><br>
<A HREF="javascript:RunOWApp('P43090_W43090A_ZJDE0001');">Supplier Item
information</a><br>
<A HREF="javascript:RunOWApp('P04012_W04012D_ZJDE0002');">Purchasing
Instructions</a><br>
<A HREF="javascript:RunOWApp('P43041_W43041A_ZJDE0001');">Purchasing
Ledger</a><br><br>

<br>
<P><Font Color="#336699"></p><b><big>Quote Tasks</big></b>
<br>
<A HREF="javascript:RunOWApp('P4310_W4310I_ZJDE0002');">Quote Order
Entry</a><br>
<A HREF="javascript:RunOWApp('P4310_W4310G_ZJDE0002');">Open Quote
Inquiry</a><br>
<A HREF="javascript:RunOWApp('P4334_W4334B_ZJDE0001');">Enter Quote
Responses</a><br>
<A HREF="javascript:RunOWApp('P43360_W43360H_ZJDE0001');">Generate PO's From
Quotes</a><br>

<br>
<P><Font Color="#336699"></p><b><big>Buyer Shop Floor Tasks</big></b>
<br>
<A HREF="javascript:RunOWApp('P3016_W3016A_ZJDE0001');">Kanban Master</a><br>
<A HREF="javascript:RunOWApp('P3157_W3157A_ZJDE0001');">Manage Kanban
Orders</a><br>
<A HREF="javascript:RunOWApp('P3157_W3157A_ZJDE0001');">Check-Out
Kanban-Consumption</a><br>
<A HREF="javascript:RunOWApp('P3157_W3157A_ZJDE0002');">Check-in
Kanban-Supply</a><br>
```



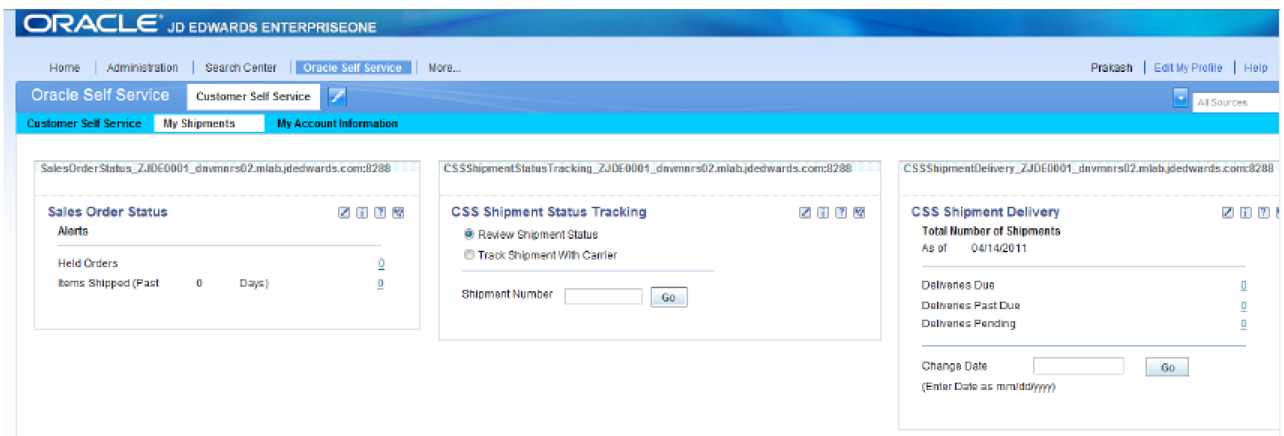
19. Set the required permissions and click "Done".

9.3 Creating a Customer Self-Service Page

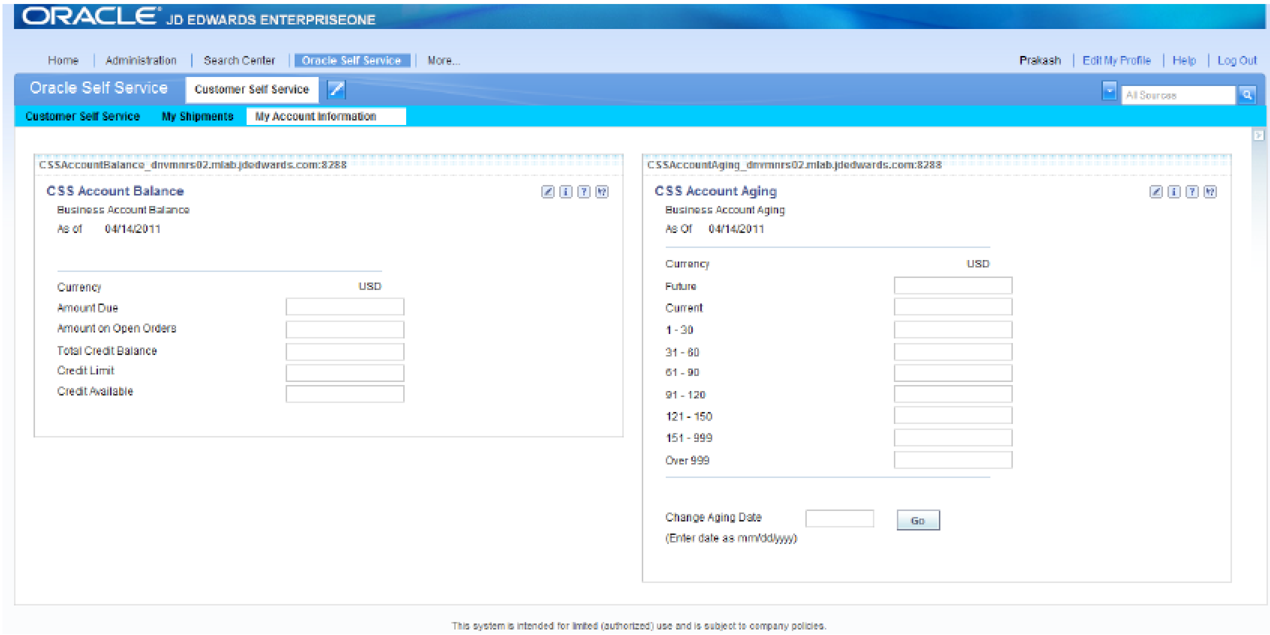
In this section we will create a Customer Self-Service page. The Customer Self- Service portal page is created using eight EnterpriseOne FDA portlets. These three images comprise the Customer Self Service portal:



Home | Administration | Search Center | Oracle Self Service | More...
Prakash | Edit My Profile | Help | Log Out
Oracle Self Service
Customer Self Service
Customer Self Service
My Shipments
My Account Information
CSSCustomerAlerts_ZJDE0001_dnvmnrs02.mlab.jdedwards.com:8288
CSS Customer Alerts
Account Alerts
Past Due 0
Reminder Sent 0
Next Due Date None
Order Alerts
Held Orders 0
Items Shipped (past 0 days) 0
Shipment Alerts
As of 04/14/2011
Deliveries Due 0
Deliveries Past Due 0
Deliveries Pending 0
CSSTasks_ZJDE0001_dnvmnrs02.mlab.jdedwards.com:8288
CSS Tasks
Customer Prakash Chidambara
Tasks
Manage Orders
Go
CSSSearch_ZJDE0001_dnvmnrs02.mlab.jdedwards.com:8288
CSS Search
Search for:
Orders by Customer PO No.
Go
Or Advanced Search for:
Invoices
Go
This system is intended for limited (authorized) use and is subject to company policies.



ORACLE JD EDWARDS ENTERPRISEONE
Home | Administration | Search Center | Oracle Self Service | More...
Prakash | Edit My Profile | Help
Oracle Self Service
Customer Self Service
Customer Self Service
My Shipments
My Account Information
SalesOrderStatus_ZJDE0001_dnvmnrs02.mlab.jdedwards.com:8288
Sales Order Status
Alerts
Held Orders 0
Items Shipped (Past 0 Days) 0
CSSShipmentStatusTracking_ZJDE0001_dnvmnrs02.mlab.jdedwards.com:8288
CSS Shipment Status Tracking
Review Shipment Status
Track Shipment With Carrier
Shipment Number
Go
CSSShipmentDelivery_ZJDE0001_dnvmnrs02.mlab.jdedwards.com:8288
CSS Shipment Delivery
Total Number of Shipments
As of 04/14/2011
Deliveries Due 0
Deliveries Past Due 0
Deliveries Pending 0
Change Date
Go
(Enter Date as mm/dd/yyyy)

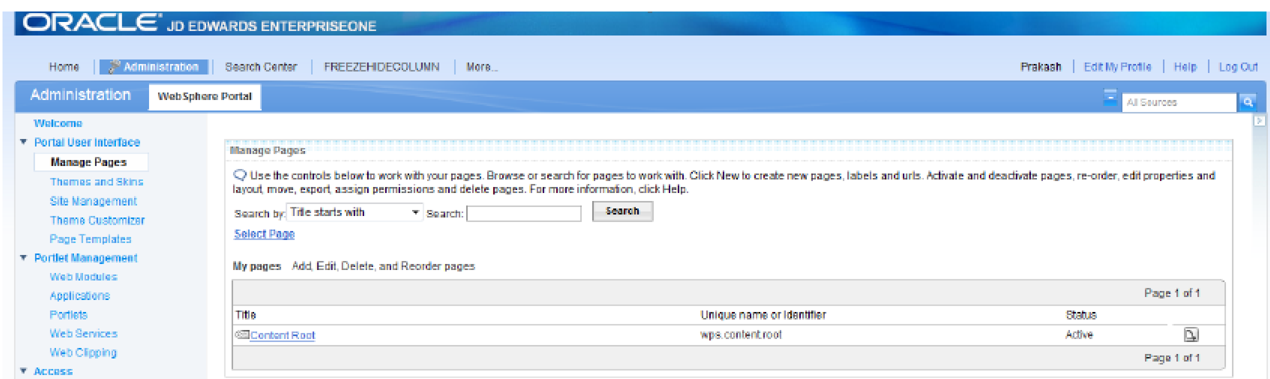


To create a Customer Self-Service page:

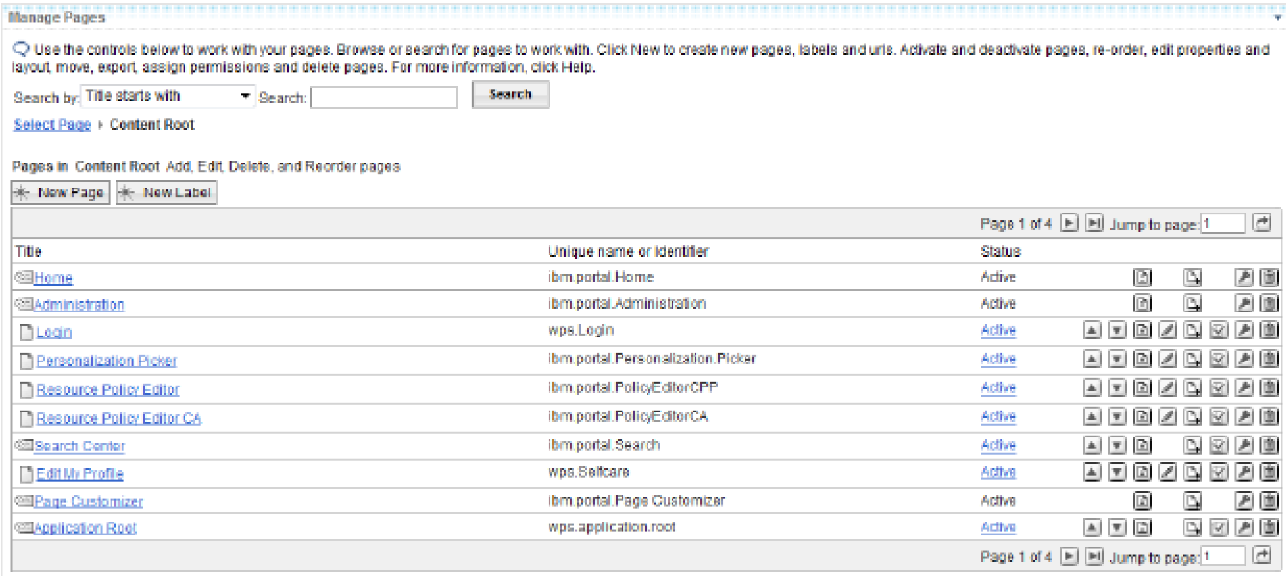
1. Login into the Collaborative Portal using the user name and password provided to you. If you do not have user name and password, register yourself.

   The user name for the portal you are using must match the user name for the EnterpriseOne environment that the portlets are running on.

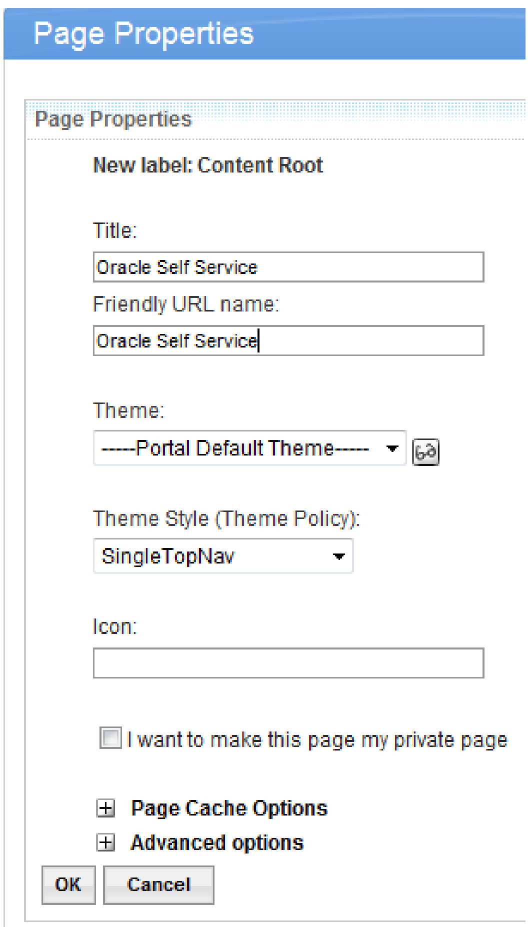
   E.g. If the user name and password for PY900 is AB1234, then the portal user name and password for the WebCenter/Collaborative Portal running PY900 portlets must be AB1234.



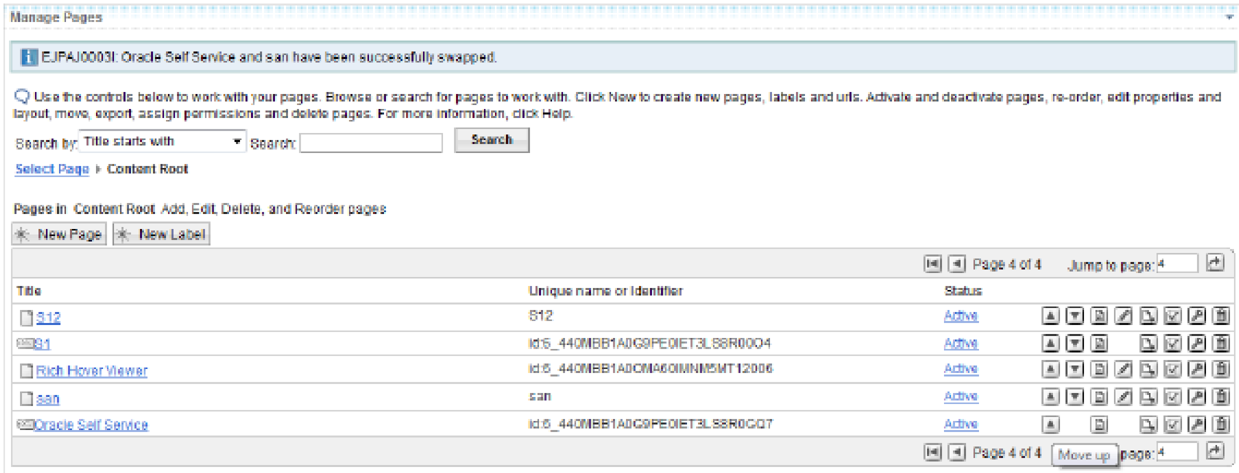
2. Select "Content Root" from Manage Pages present under Administration tab.

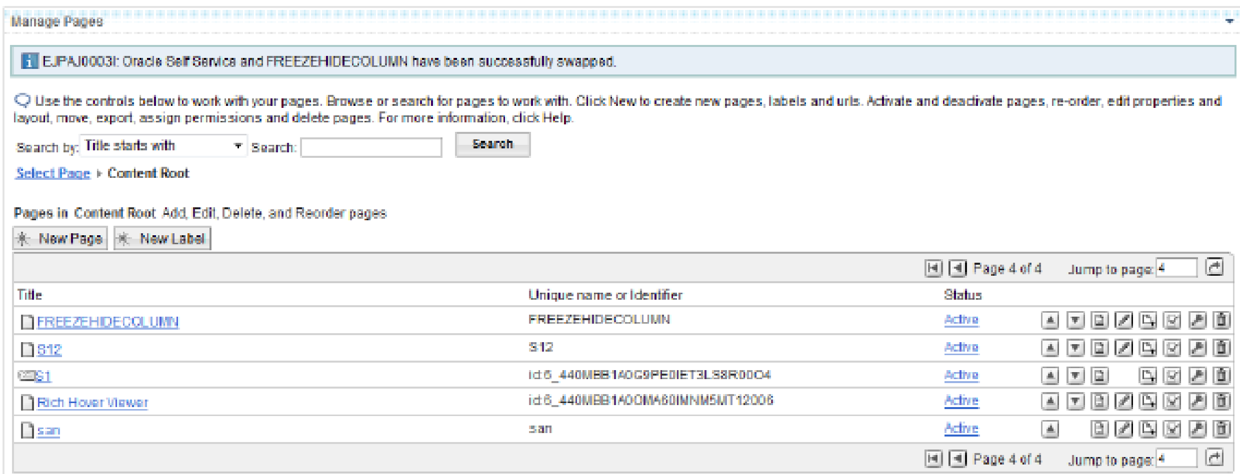


3. Click the "New Label" button.

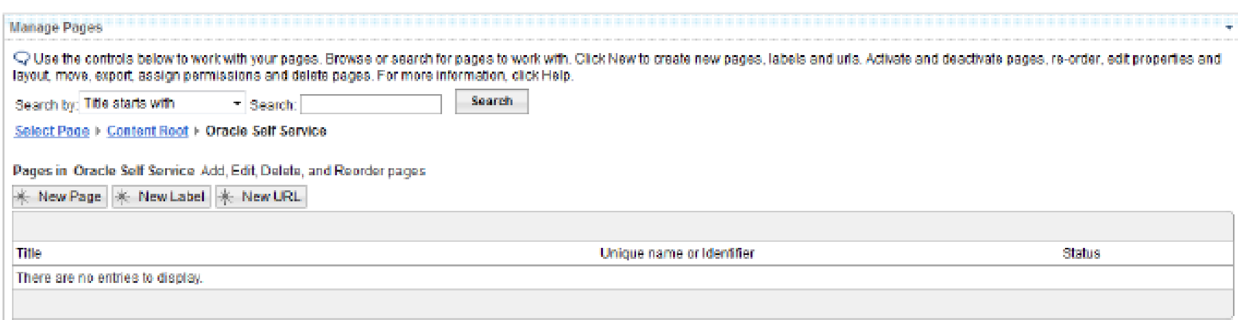


4. Fill the Page Properties and click the "OK" button.

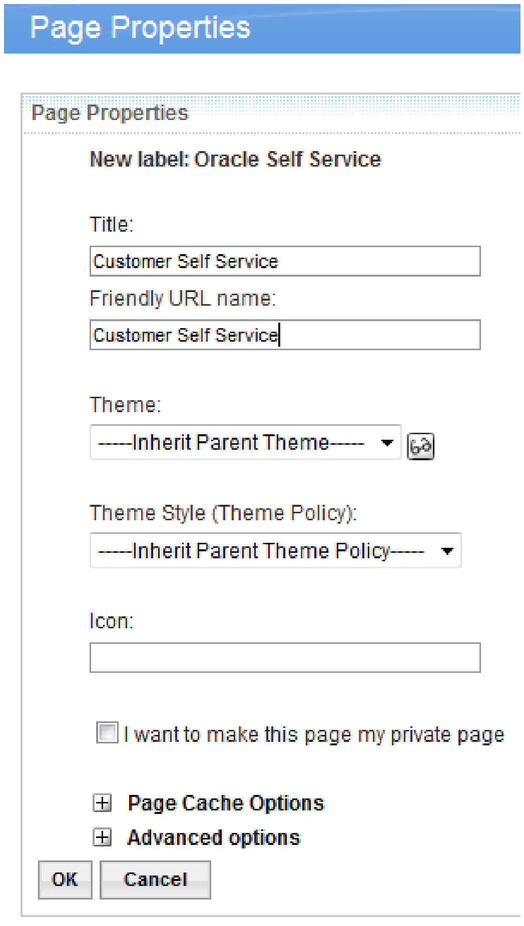




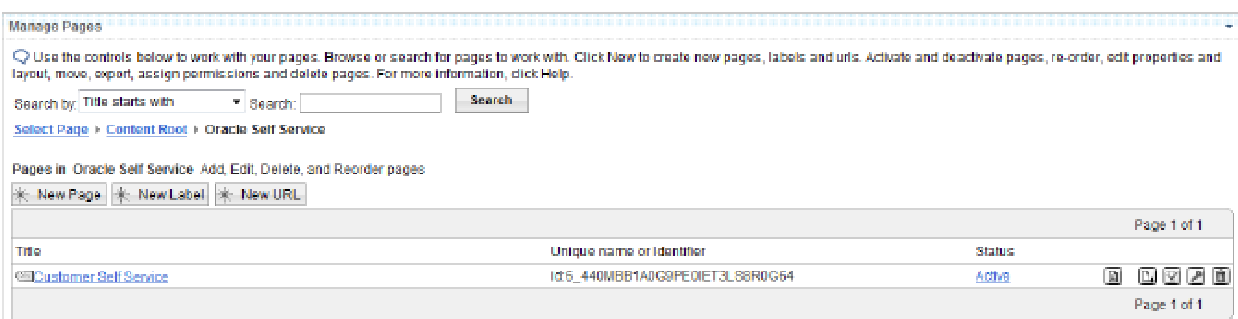
5. If the new label created is not visible in the tabs, the user can make it visible by moving the page created up to the queue so that the created label will be visible in the tabs.



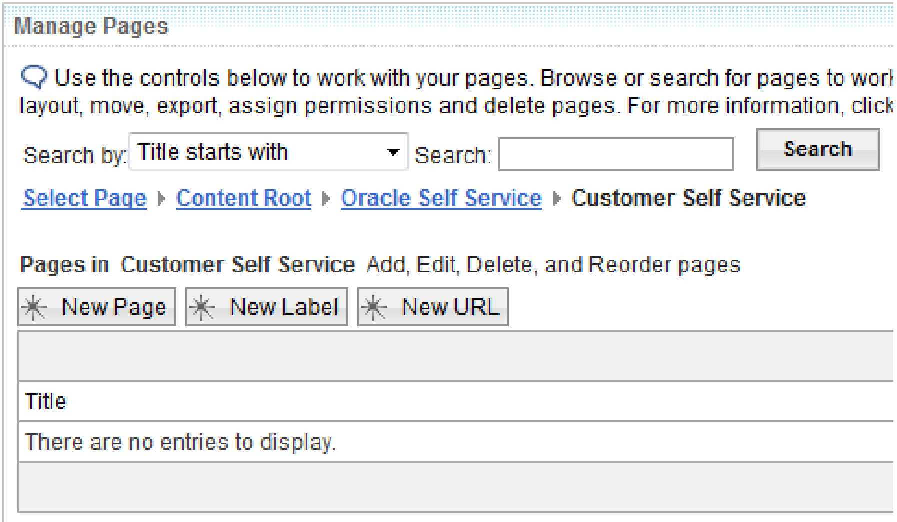
6. Select the "Oracle Self Service" label created and click on new label.



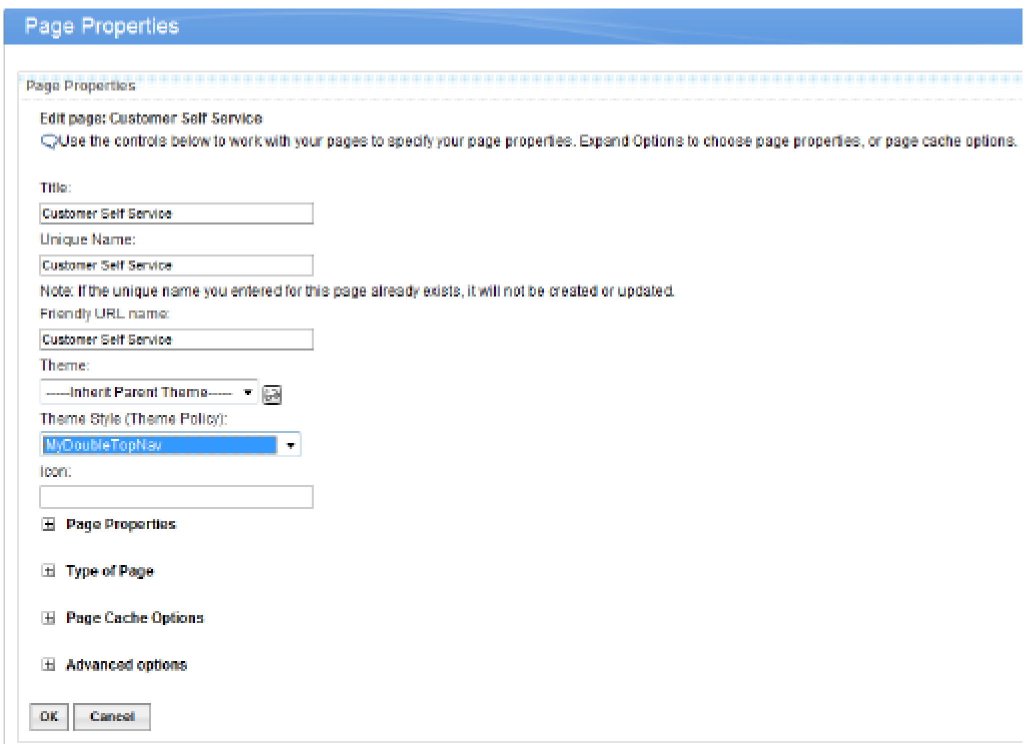
7. Fill in the Page Properties and click the "OK" button.



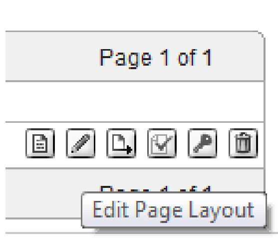
8. Select the created Customer Self Service label.



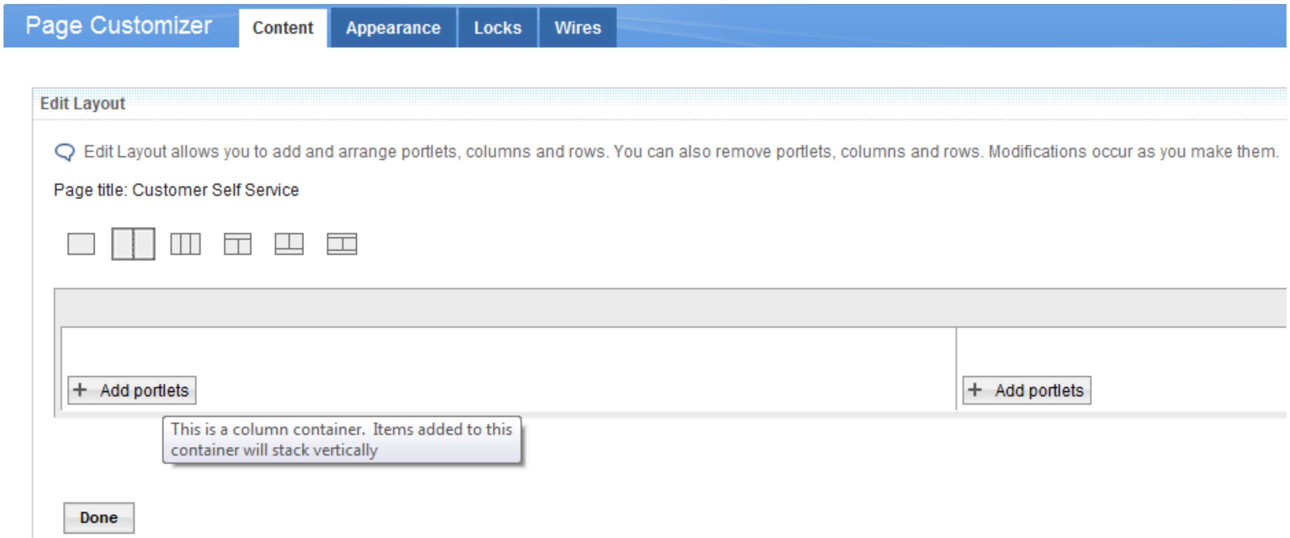
9. Click the "New Page" button.



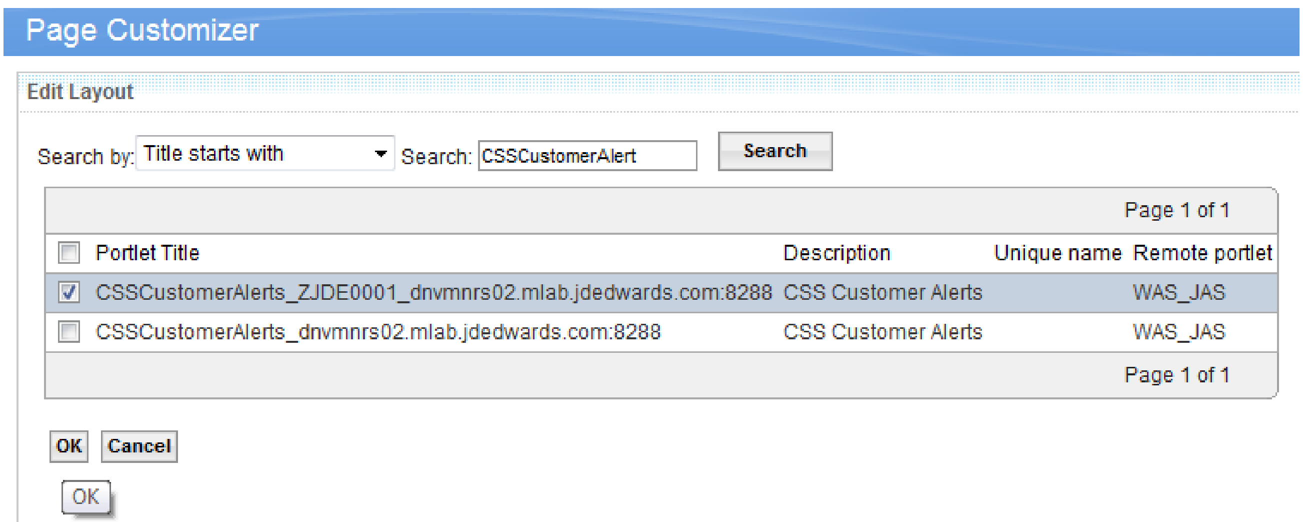
10. Fill in the Page Properties and click the "OK" button.



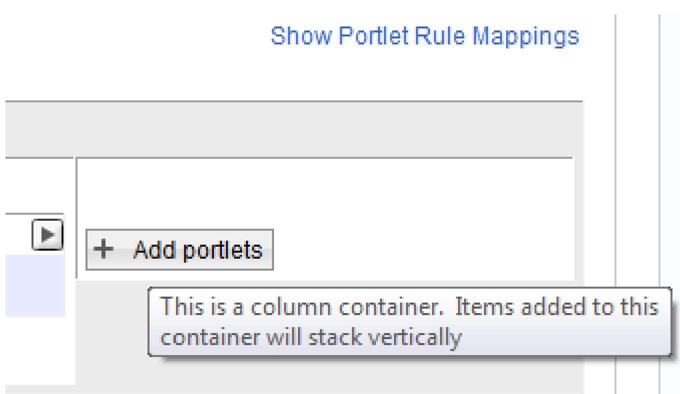
11. Click the "Edit Page Layout" button.



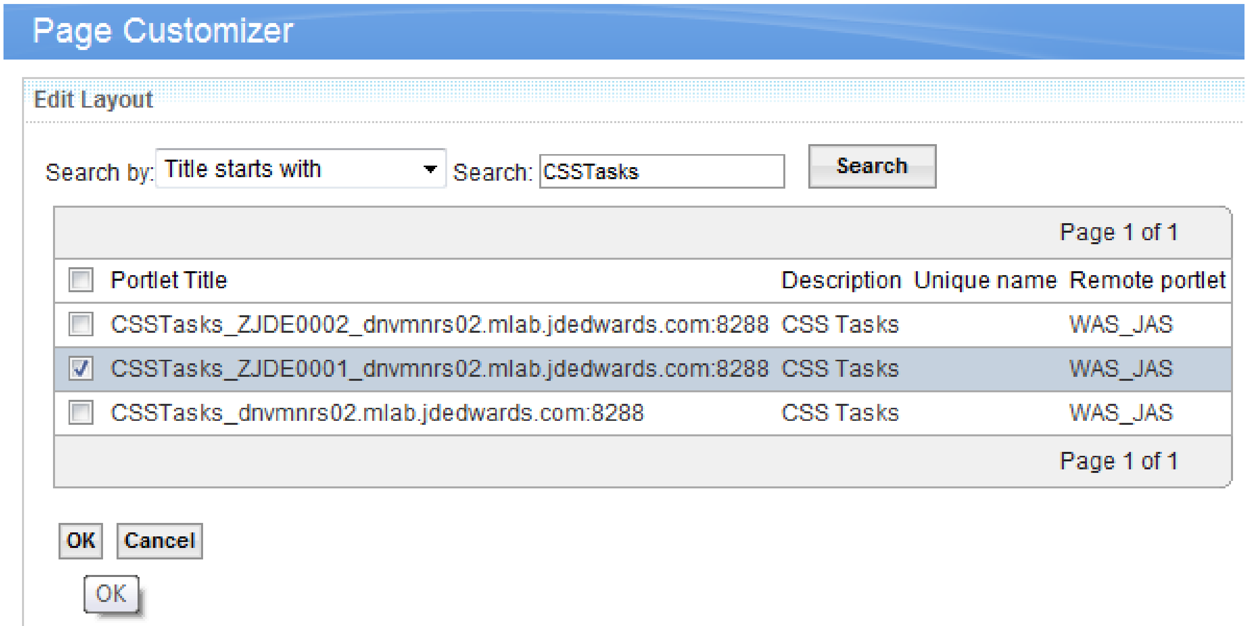
12. Select the second layout and click the "Add Portlets" button on the left pane.



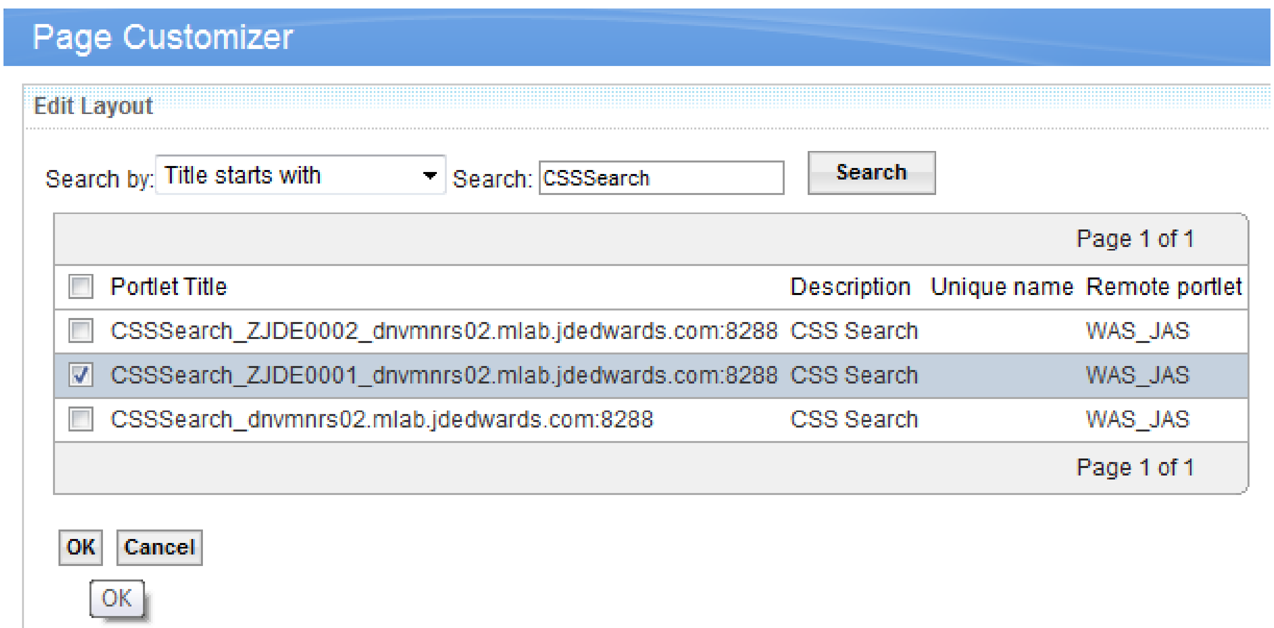
13. To add the CSSCustomerAlerts portlet to the left pane, search for the string "CSSCustomerAlerts" to find the list of CSSCustomerAlerts portlets available, select one and click OK button.



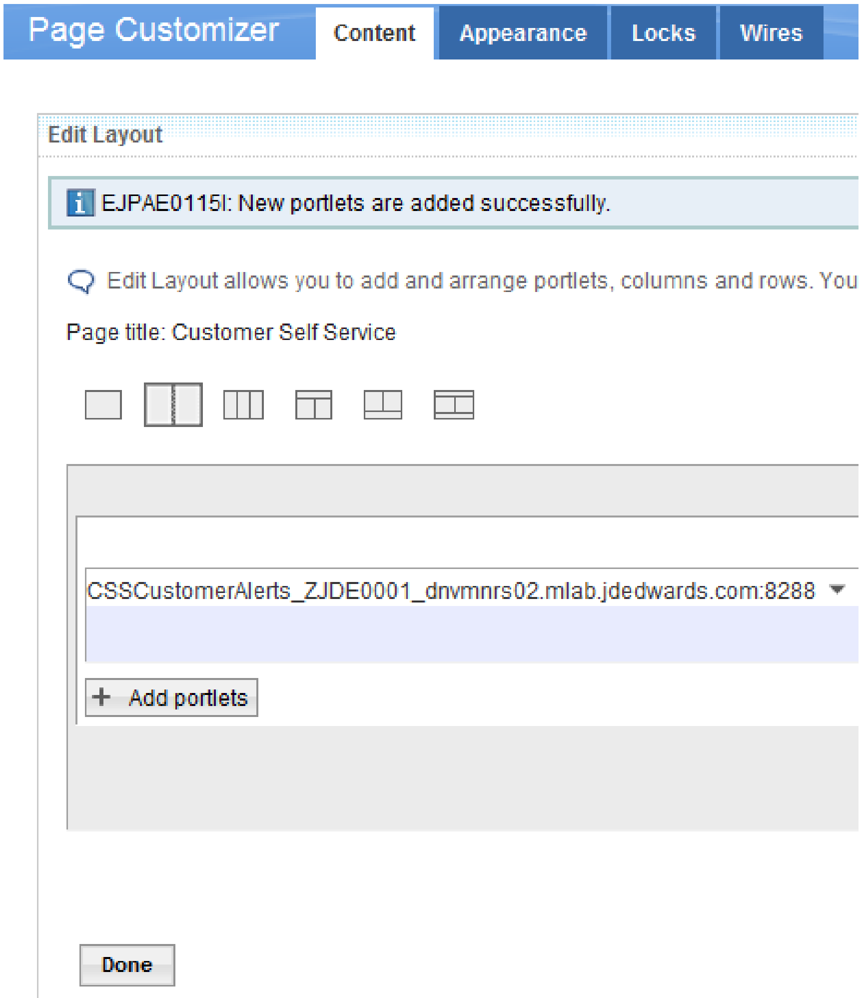
14. Click the "Add Portlets" button on the right pane.



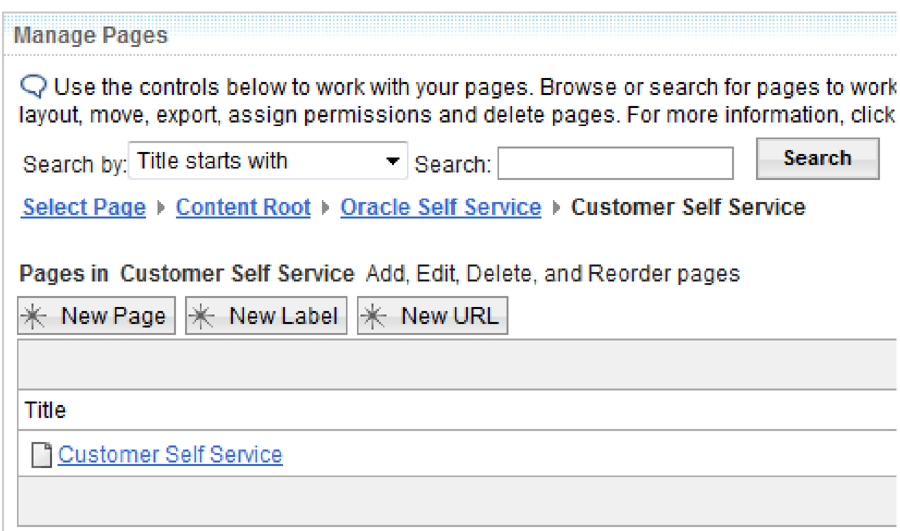
15. To add the CSS Tasks portlet to the right pane, search for the string "CSS Tasks" to find the list of CSS Tasks portlets available, select one and click OK button.



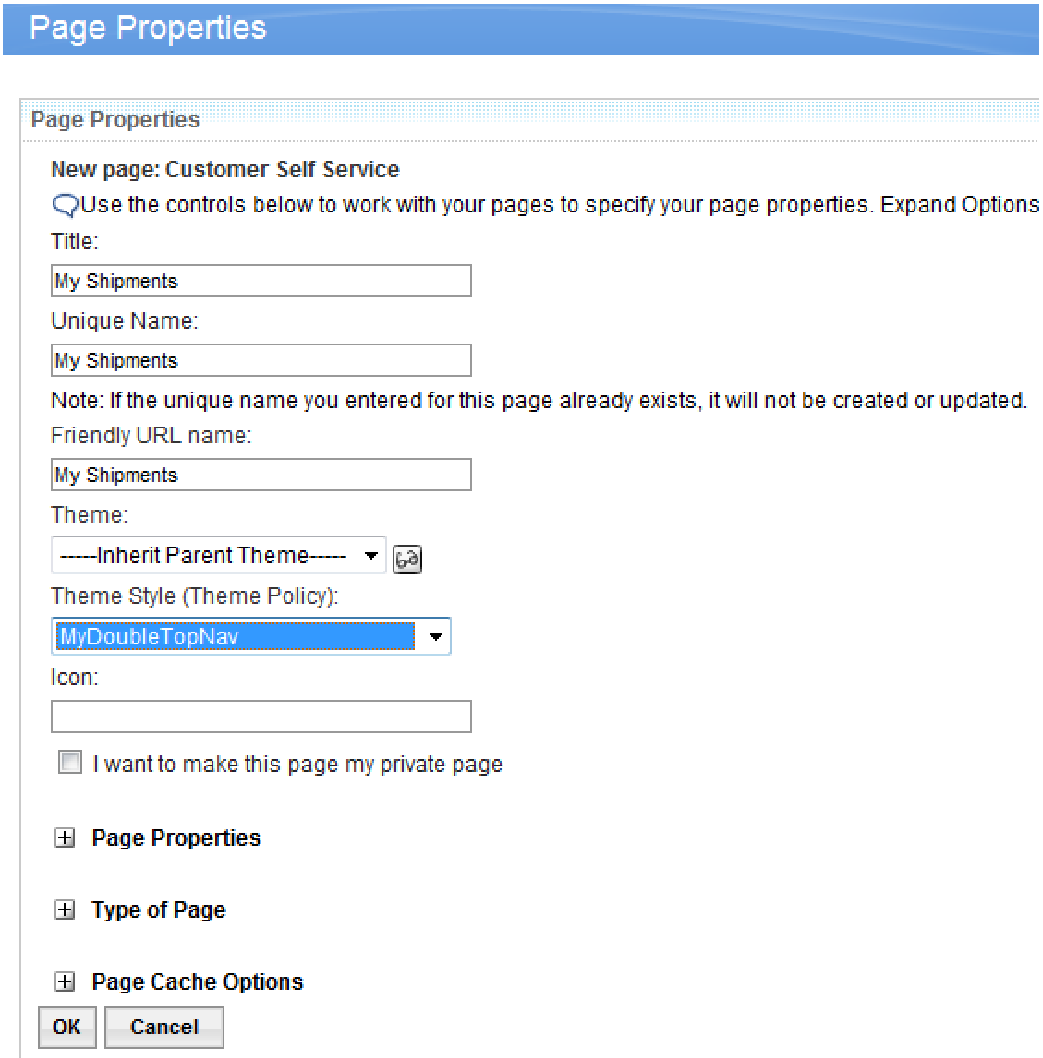
16. Click the "Add Portlets" button on the right pane and to add the CSS Search portlet to the right pane, search for the string "CSS Search" to find the list of CSS Search portlets available, select one and click OK button.



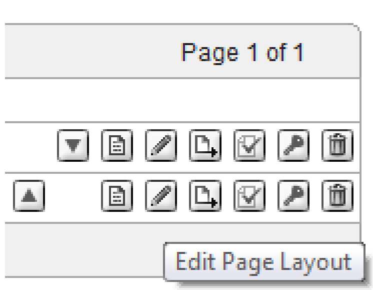
17. Click the "Done" button after adding all the three portlets.



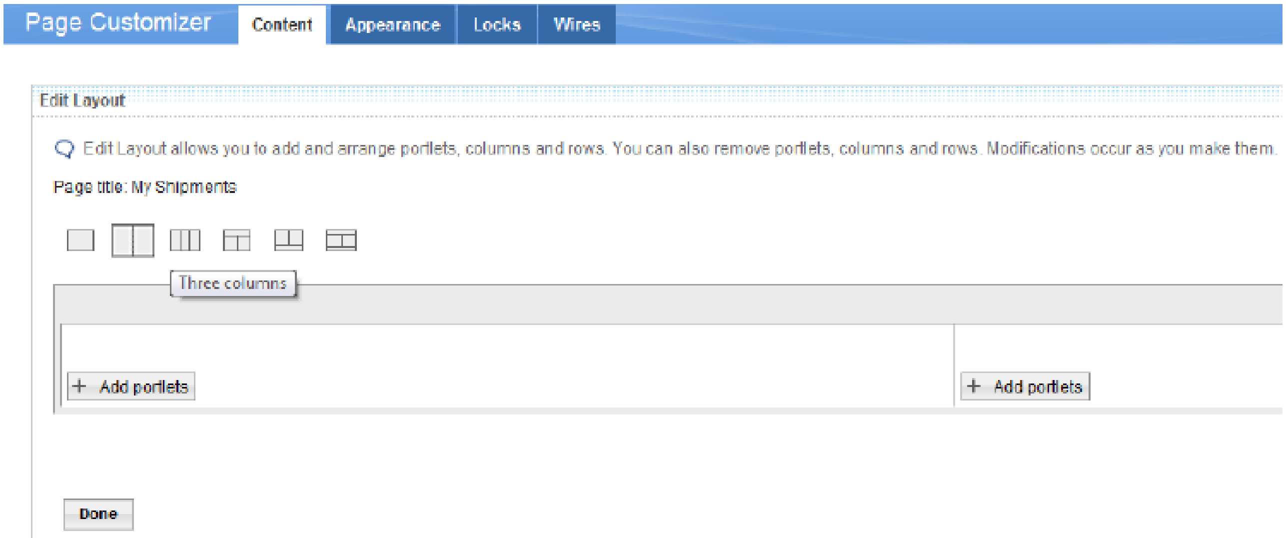
18. Click the "New Page" button.



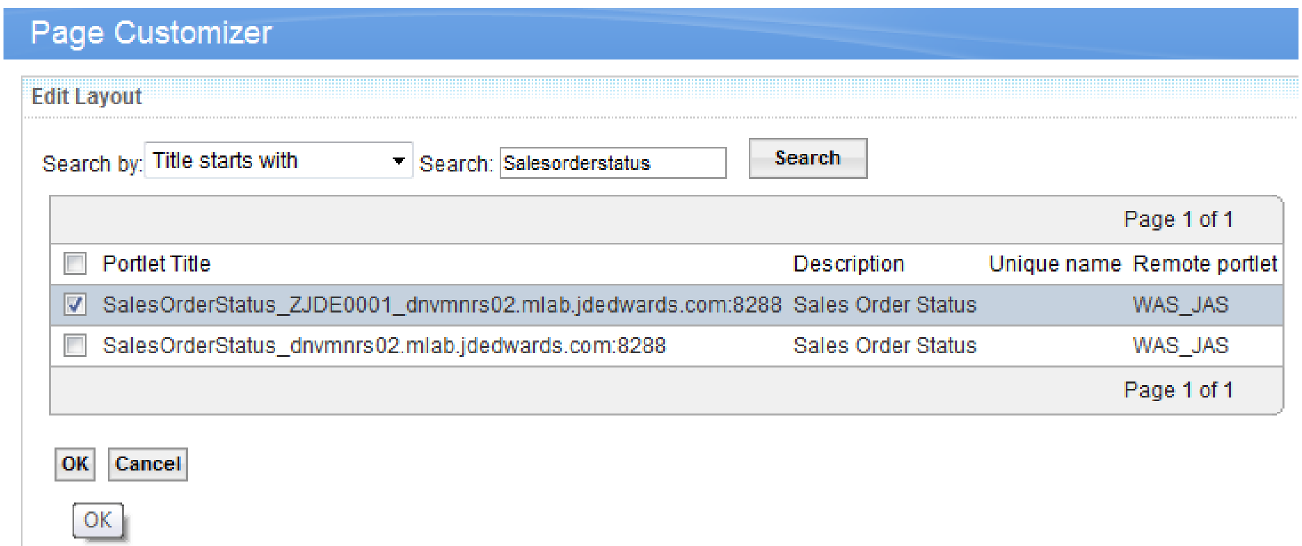
19. Fill in the Page Properties and click the "OK" button.



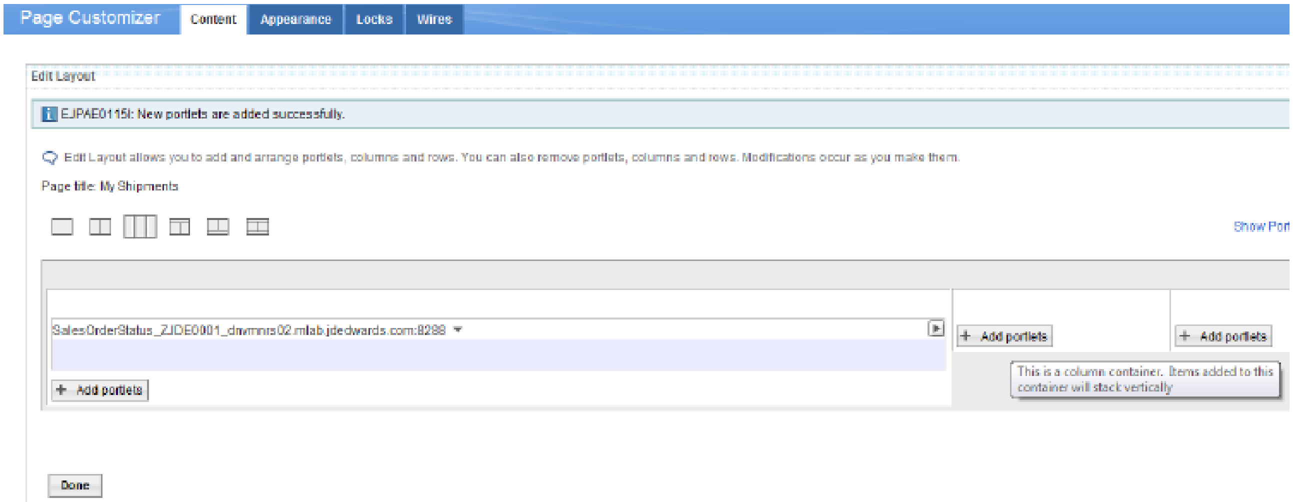
20. Click the "Edit Page Layout" button for the new page created.



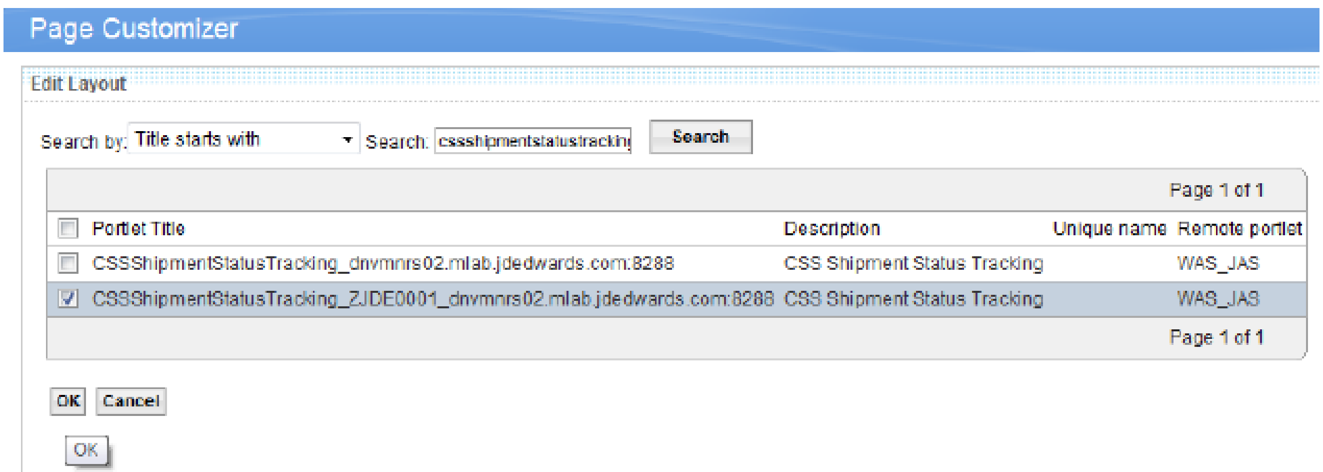
21. Select the third layout and click the "Add Portlets" button on the left pane.



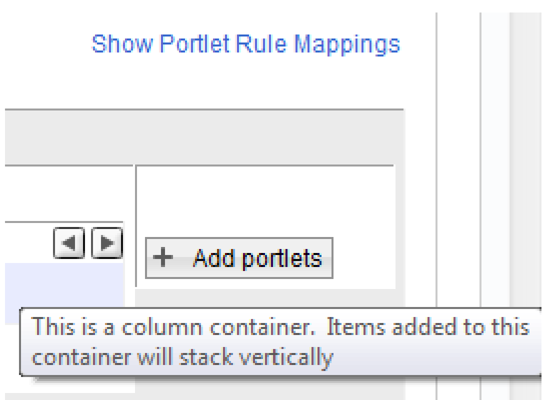
22. To add the Sales Order Status portlet to the left pane, search for the string "SalesOrderStatus" to find the list of Sales Order Status portlets available, select one and click OK button.



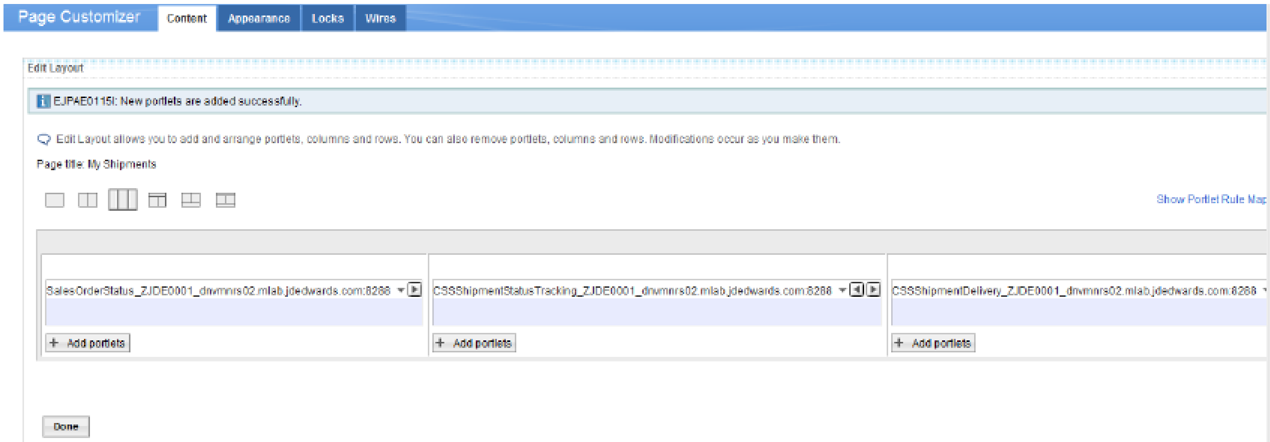
23. Click the "Add Portlets" button on the center pane.



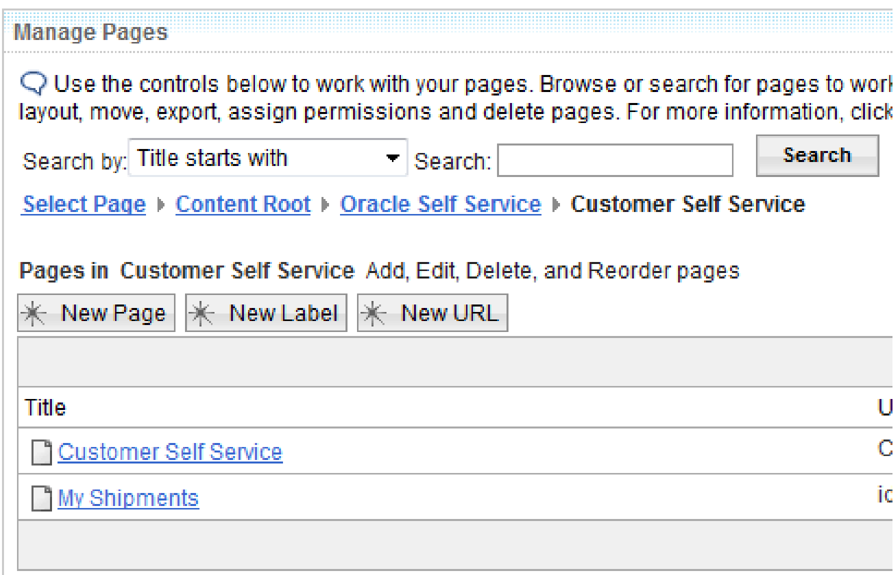
24. To add the CSS Shipment Status Tracking portlet to the center pane, search for the string "CSSShipmentStatusTracking" to find the list of CSS Shipment Status Tracking portlets available, select one and click OK button.



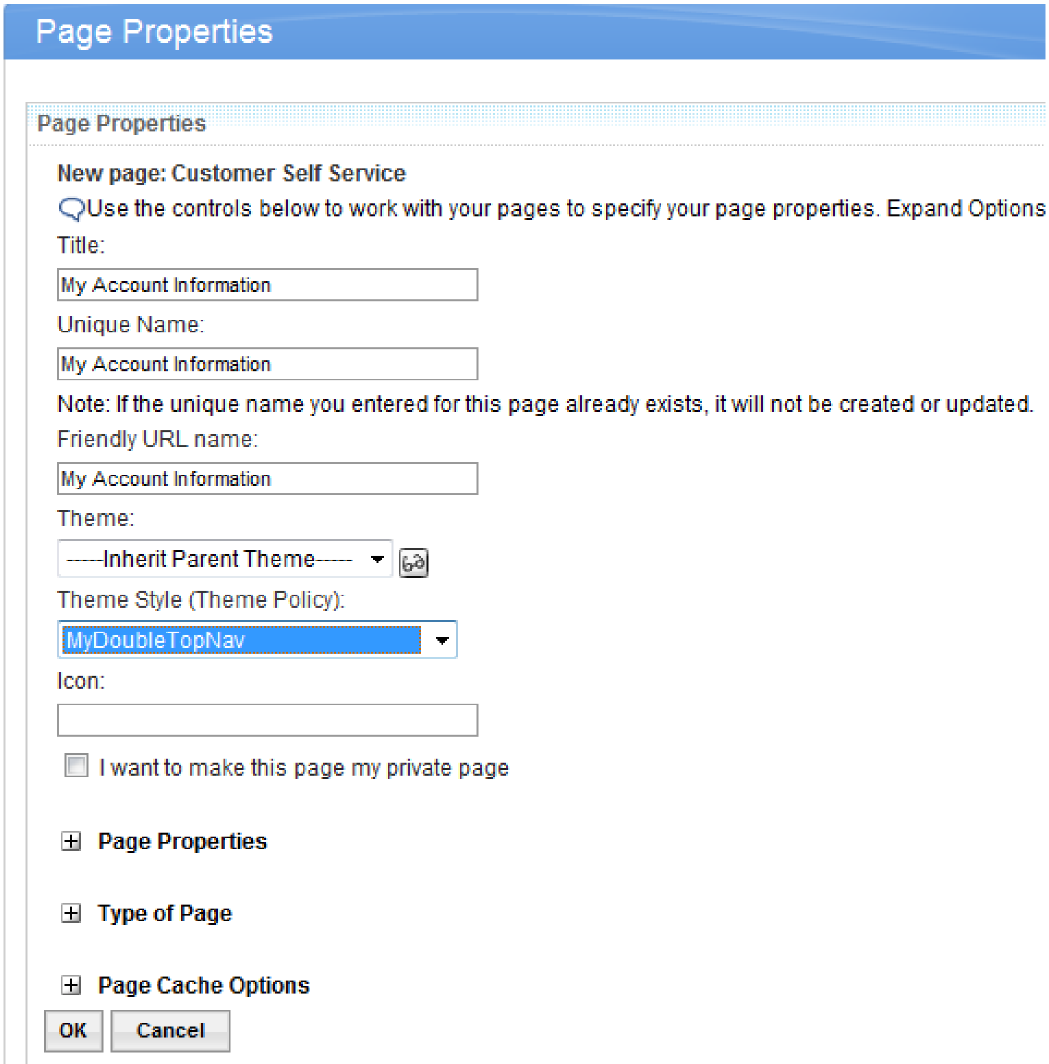
25. Click the "Add Portlets" button on the right pane.



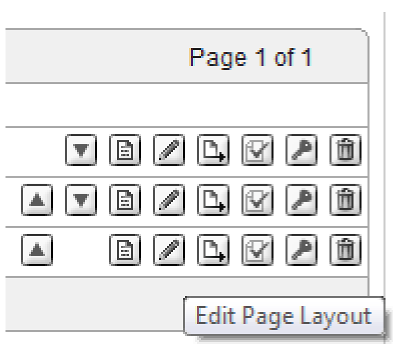
26. To add the CSS Shipment Delivery portlet to the center pane, search for the string "CSSShipmentDelivery" to find the list of CSS Shipment Delivery portlets available, select one and click OK button. Click the "Done" button after adding all the three portlets.



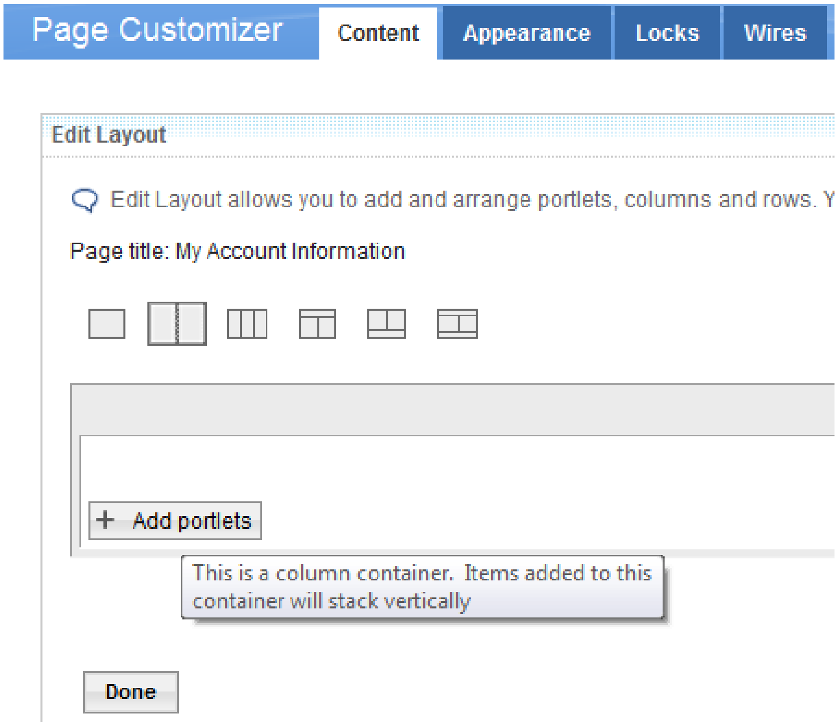
27. Click the "New Page" button.



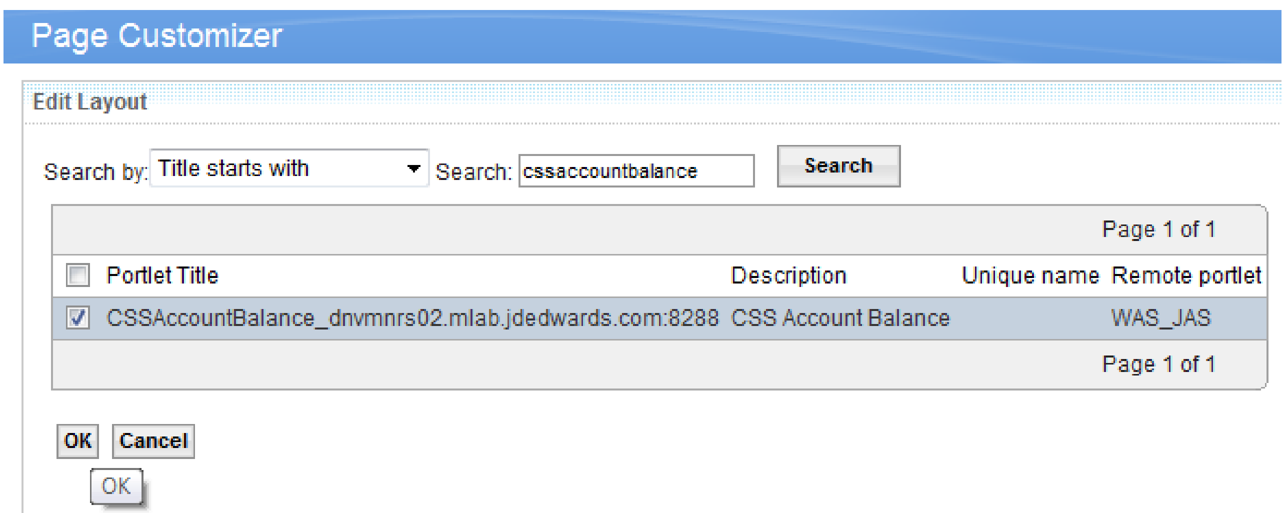
28. Fill in the Page Properties and click the "OK" button.



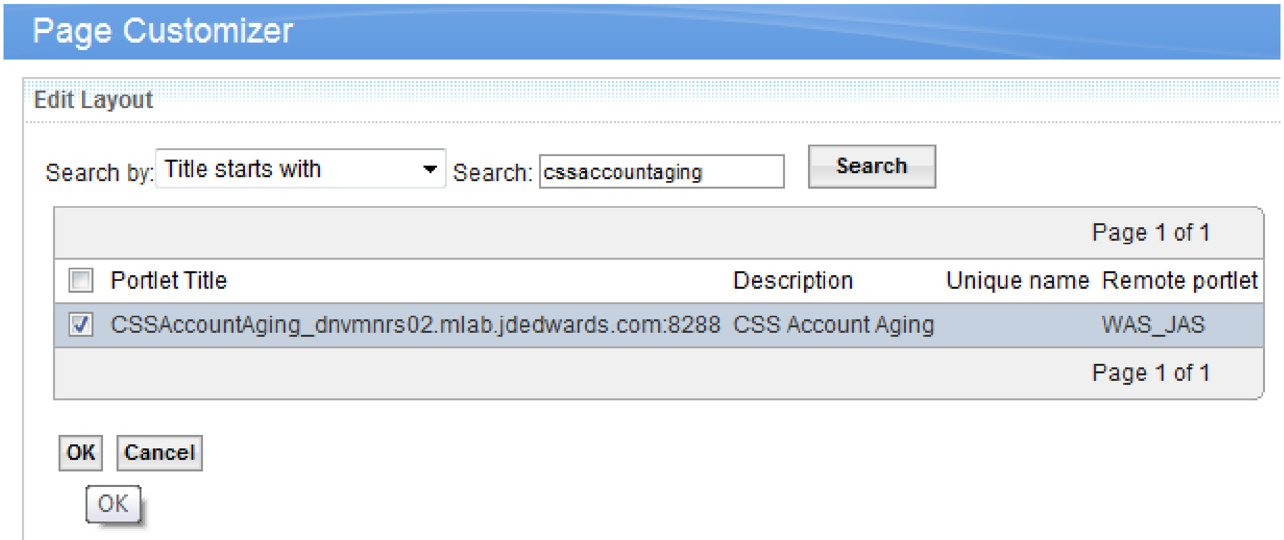
29. Click the "Edit Page Layout" button for the new page created.



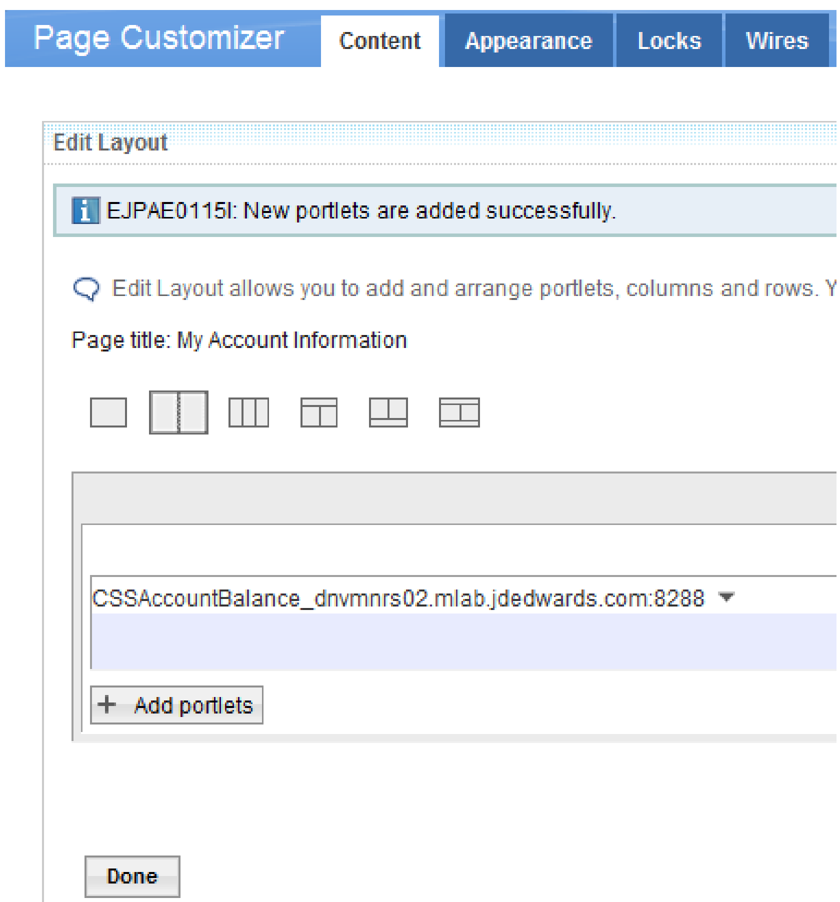
30. Select the second layout and click the "Add Portlets" button on the left pane.



31. Add the CSS Account Balance portlet to the left pane, search for the string "CSSAccountBalance" to find the list of CSS Account Balance portlets available, select one and click OK button.



32. Click the "Add Portlets" button on the right pane and to add the CSS Account Aging portlet to the right pane, search for the string "CSSAccountAging" to find the list of CSS Account Aging portlets available, select one and click OK button.

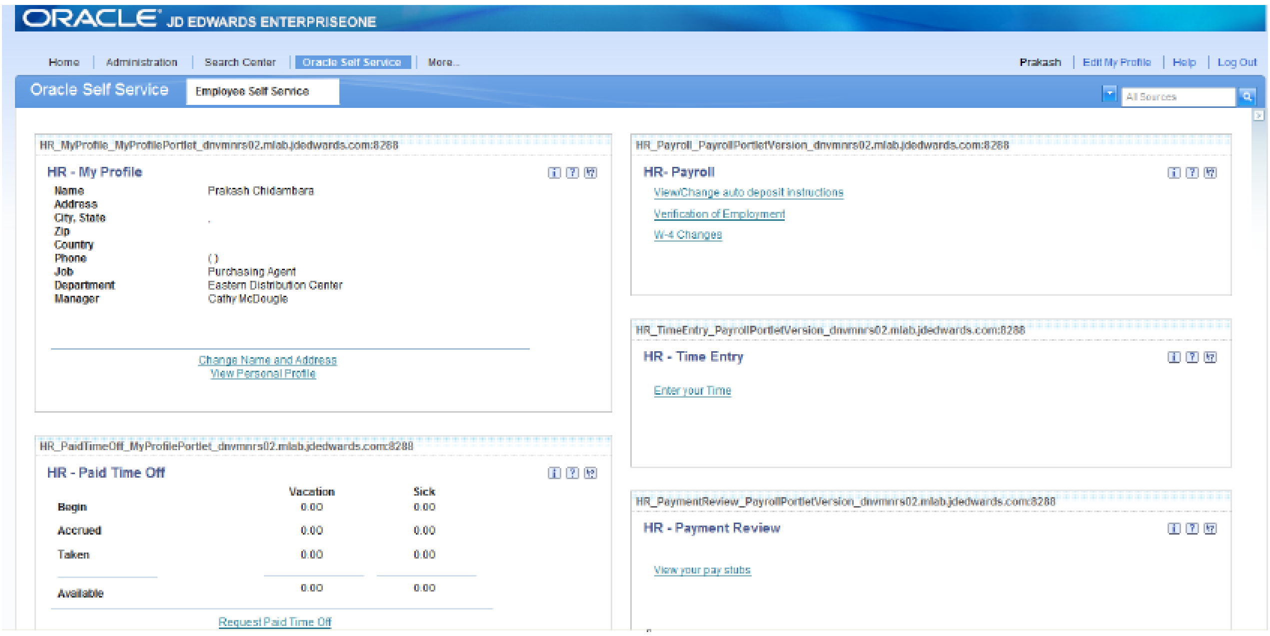


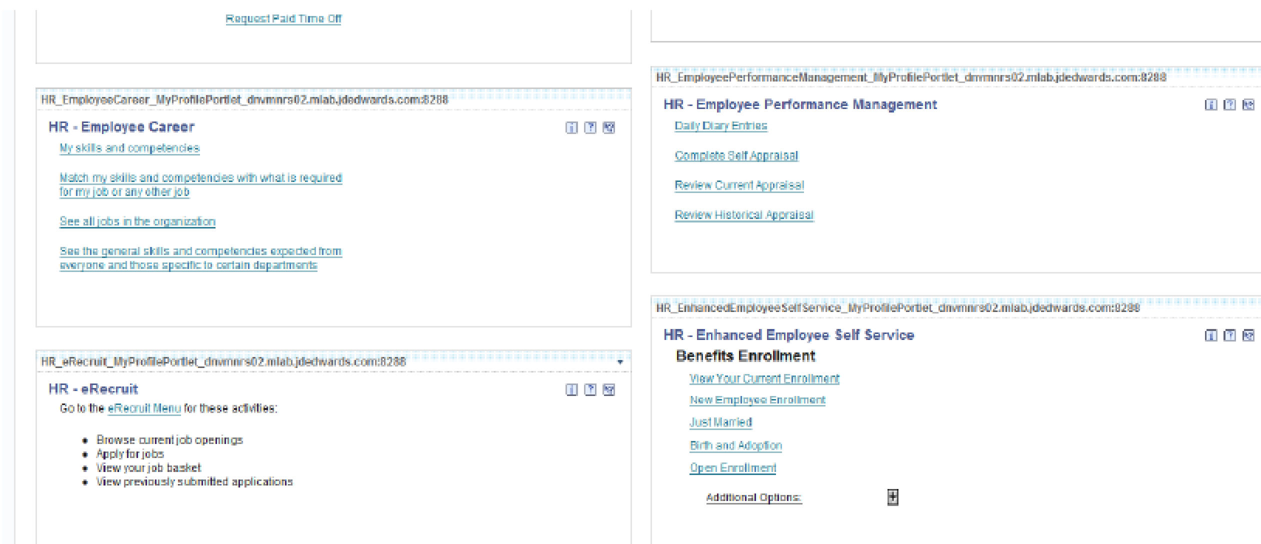
33. Click the "Done" button after adding all the two portlets.

9.4 Creating an Employee Self-Service Portal Page

This section provides the steps to create two sample HCM portal pages, the portal pages are the Employee Self Service Page and the My Workspaces page.

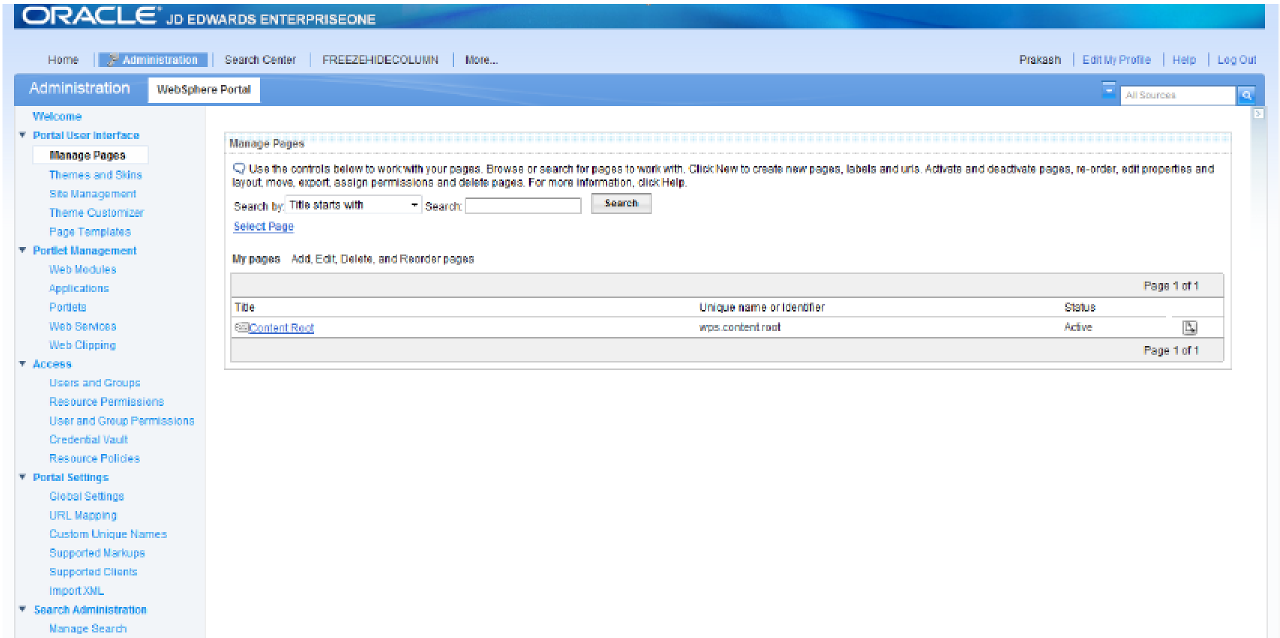
The Employee Self Service portal page is created using nine EnterpriseOne FDA portlets. These two screens represent the Employee Self Service portal page.



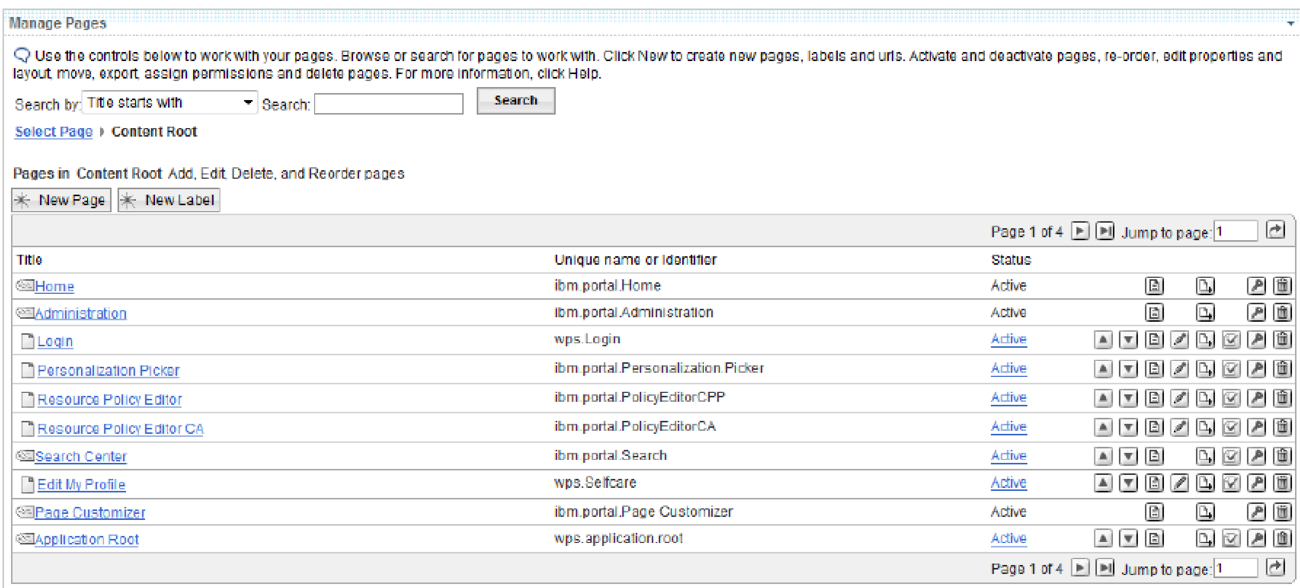


Follow these steps to create "Employee Self Service" Portal Page.

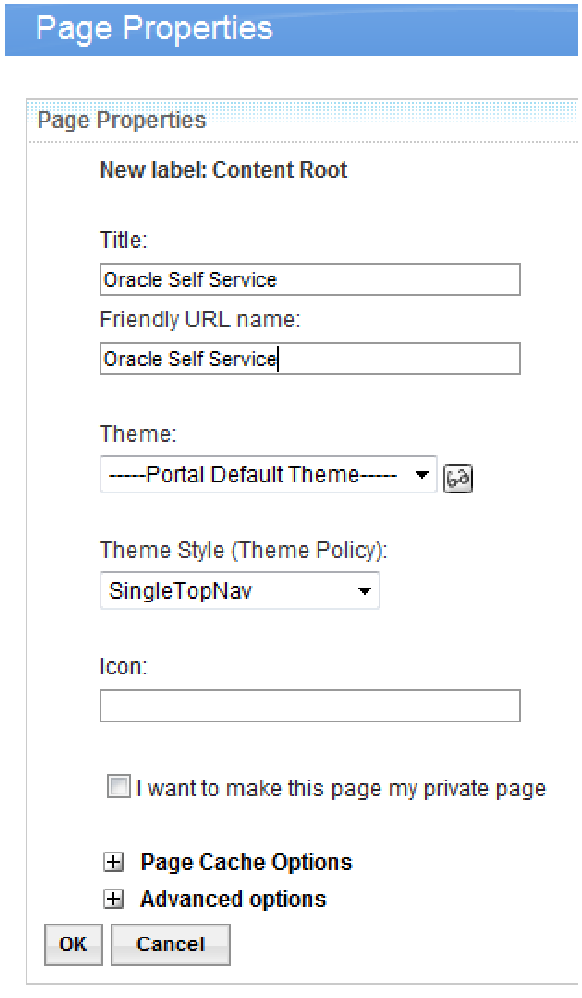
1. Choose the "Administration" tab and select "Manage Pages" under "Portal User Interface" on the left pane.



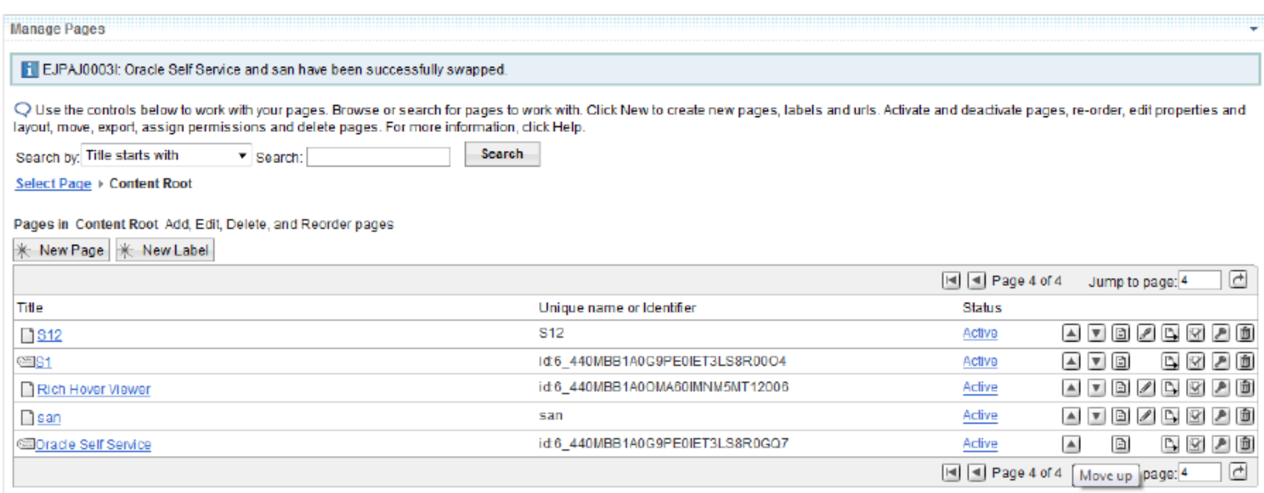
2. Select "Content Root" Link.



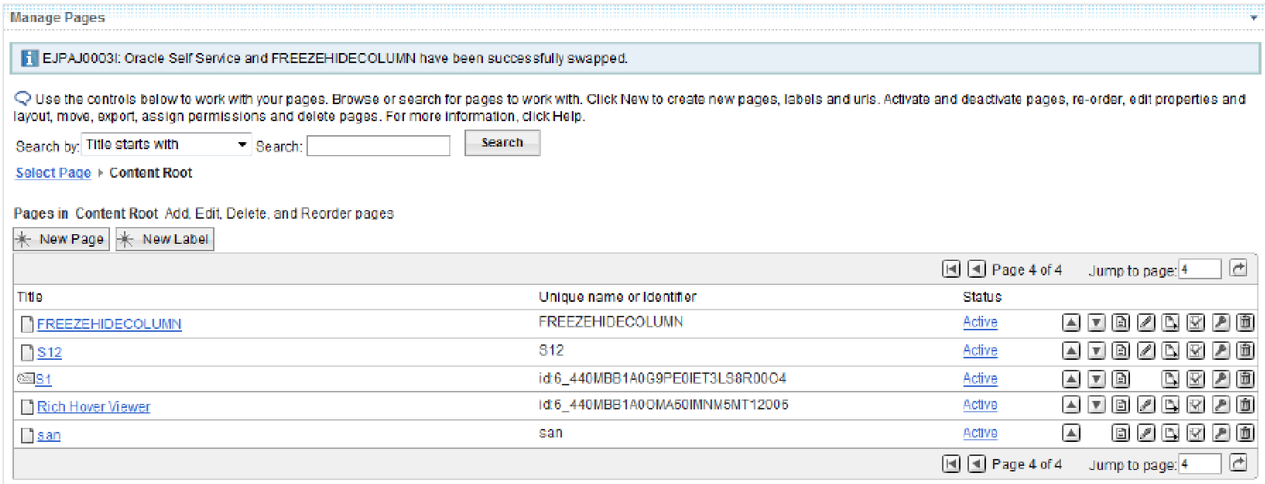
3. Click the "New Label" button.

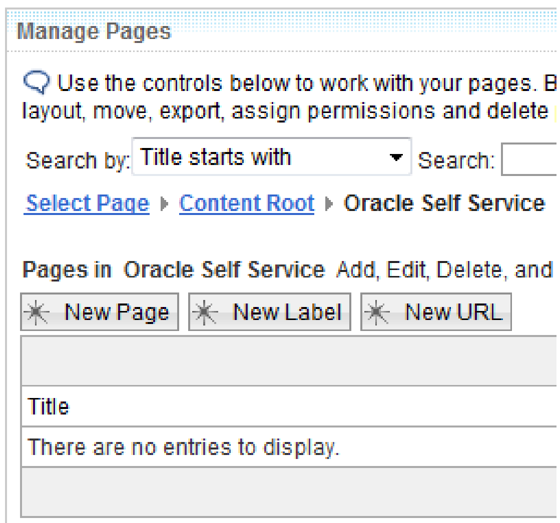


4. Enter Title and Friendly URL name as "Employee Self Service", let the Theme and the Theme Style be default. Click "OK".

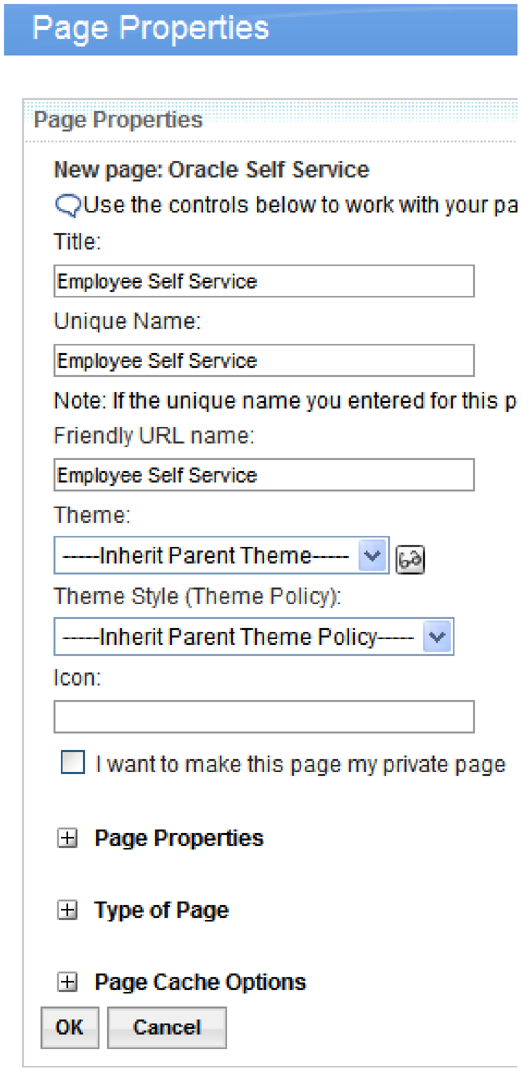


5. If the label "Oracle Self Service" created is in the "More" tab and if it needs to be made visible in the tabs, user can make it visible by moving the page created up to the queue so that the created label will be visible in the tabs.

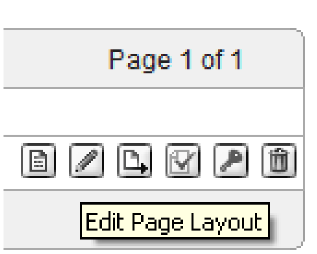




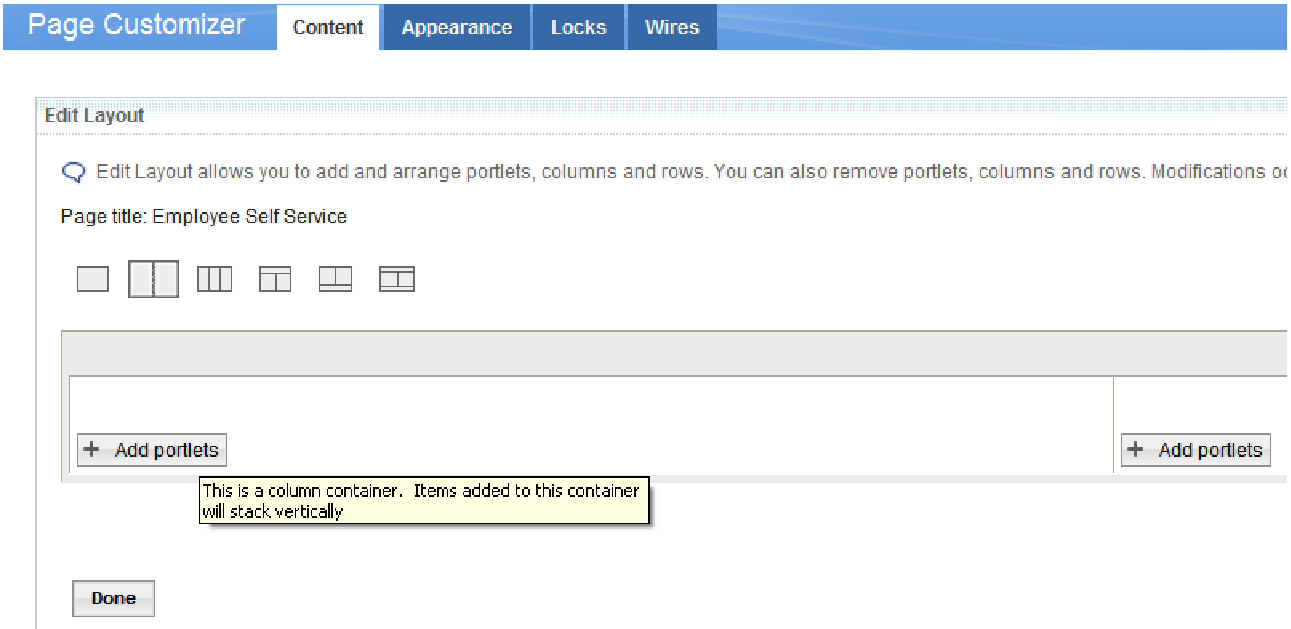
6. Select the "Oracle Self Service" label created and click on "New Page".



7. Enter Title, Unique Name and Friendly URL name as "Employee Self Service", let the theme and the Theme Style be default. Click "OK".



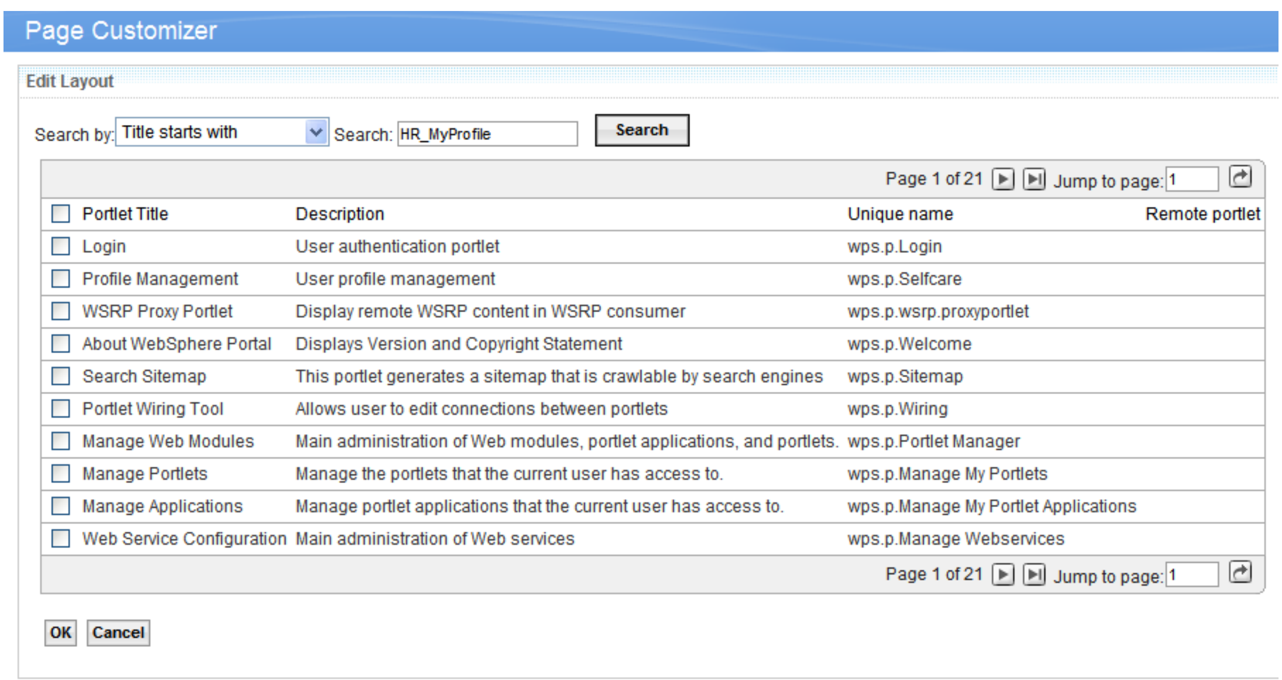
8. To add portlets to Employee Self Service page click "Edit Page Layout" button.



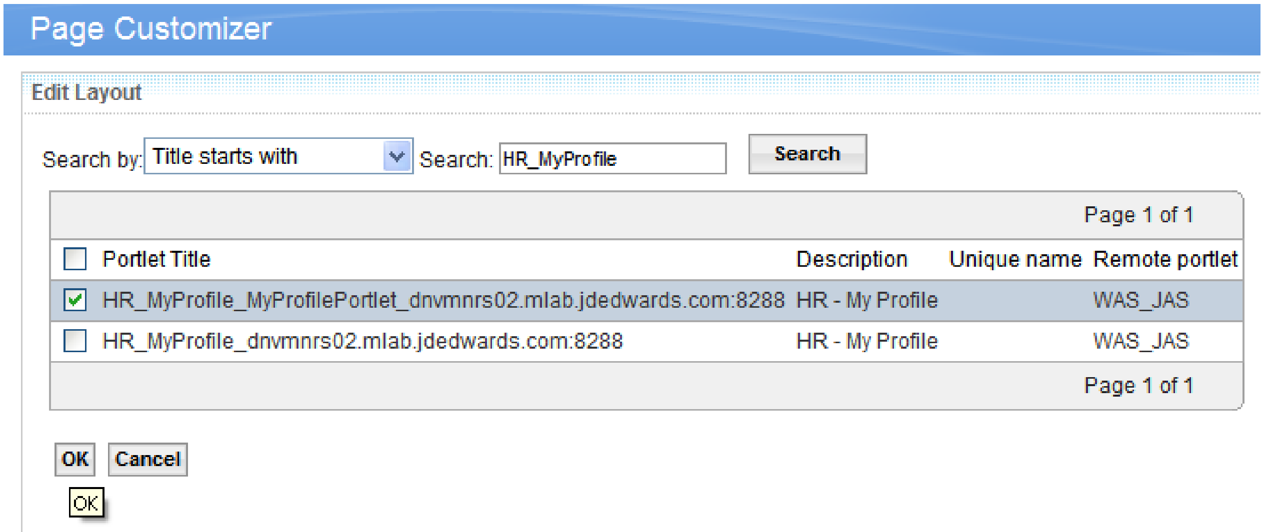
9. To add portlets to the left pane click the "Add portlets" button.

Note: All the portlets required for creating the portal page can be added to portal page one at a time and arranged as required. Clicking on "Add portlets" button will list all the portlets available on the collaborative portal, select the required portlets and click "OK". The portlets can also be searched one by one and added to the portal page in required order.

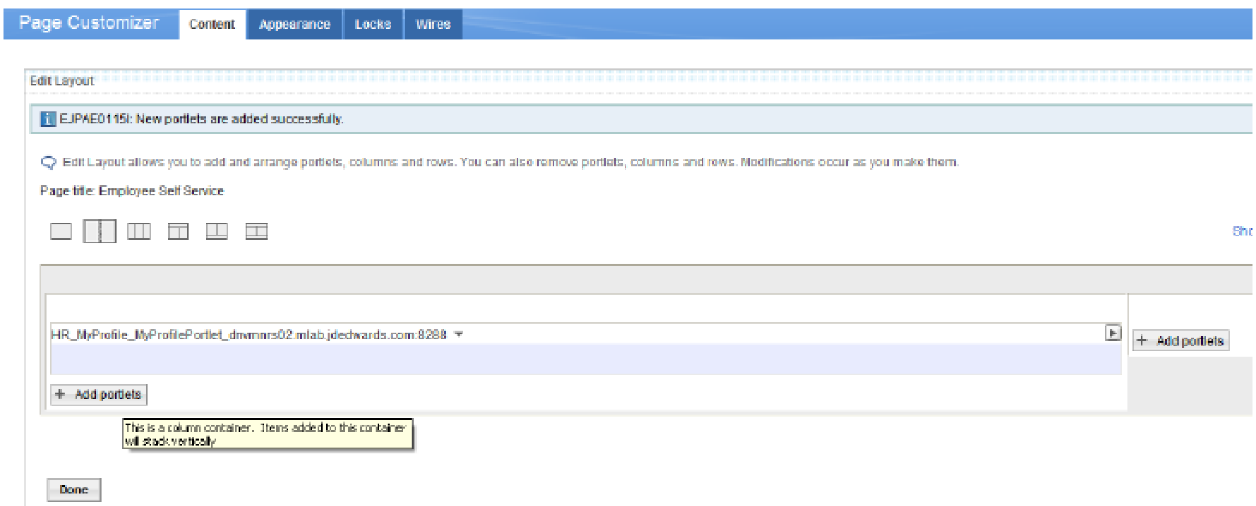
The following steps show how to add portlets to the page one by one:



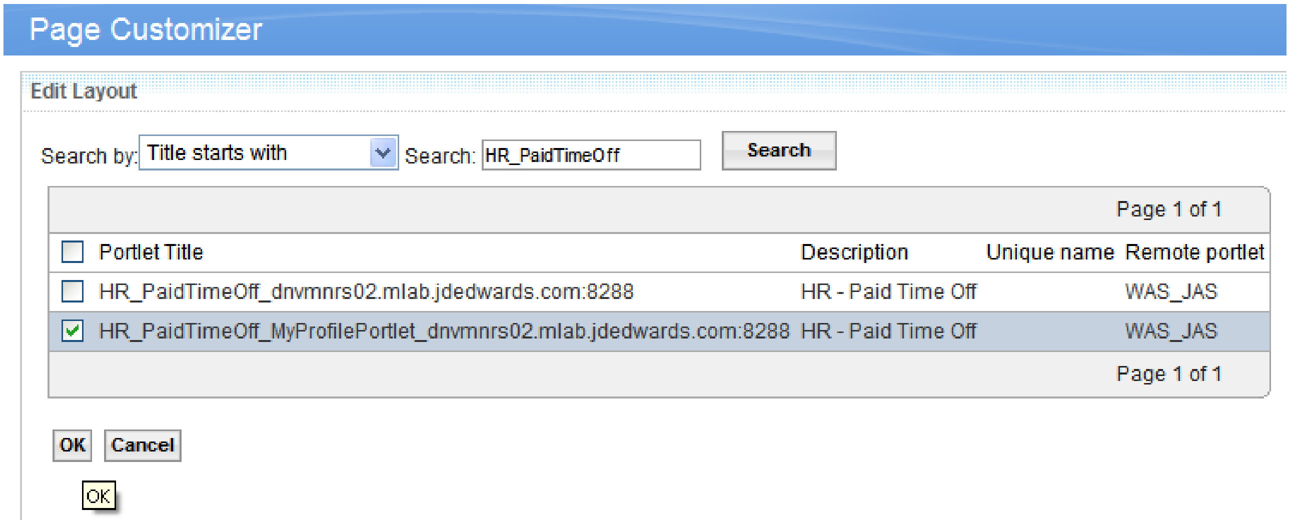
10. To add HR_MyProfile, search for HR_MyProfile.



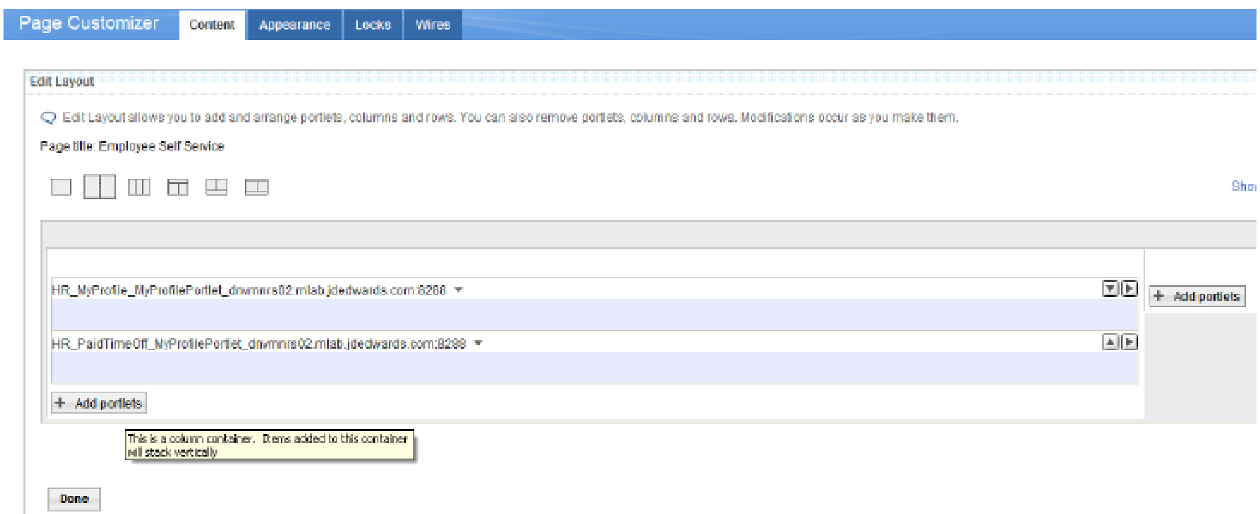
11. Select the required "HR_MyProfile" portlet from the list and click "OK".



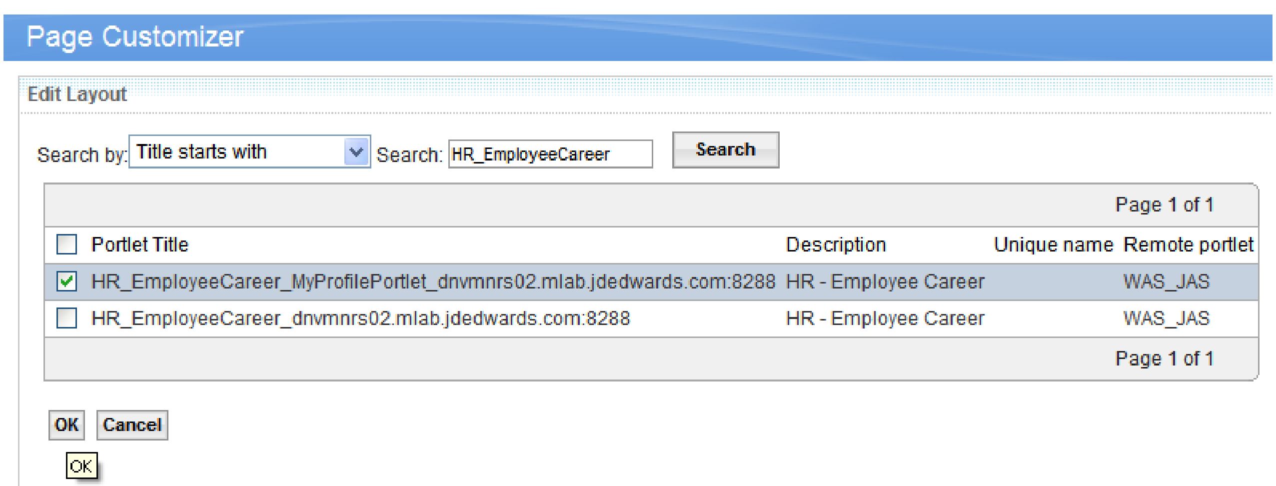
12. To add the "HR_PaidTimeOff" portlet, click the "Add portlets" button.



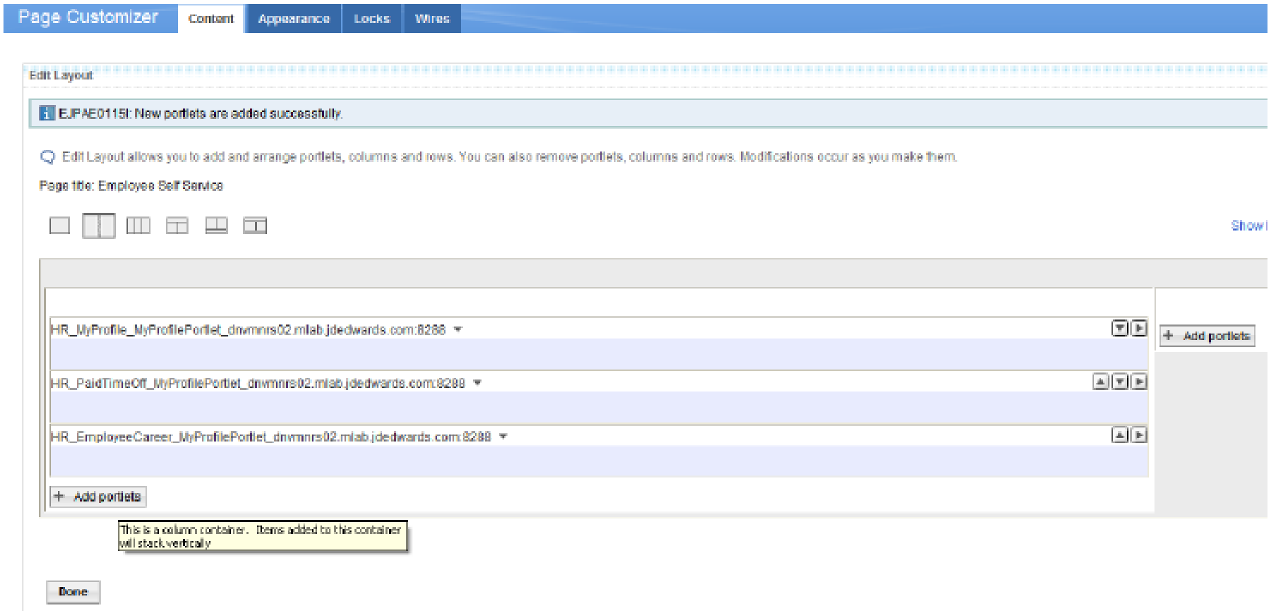
13. Search for "HR_PaidTimeOff", select the required "HR_PaidTimeOff"portlet from the list and click "OK".



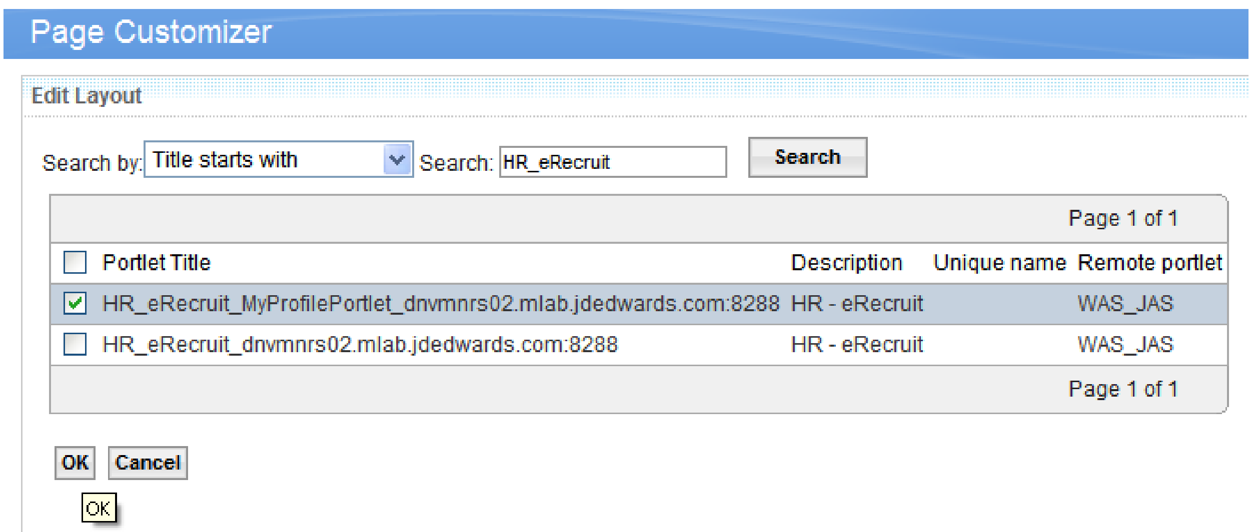
14. To add "HR_ EmployeeCareer" portlet click "Add portlets" button.



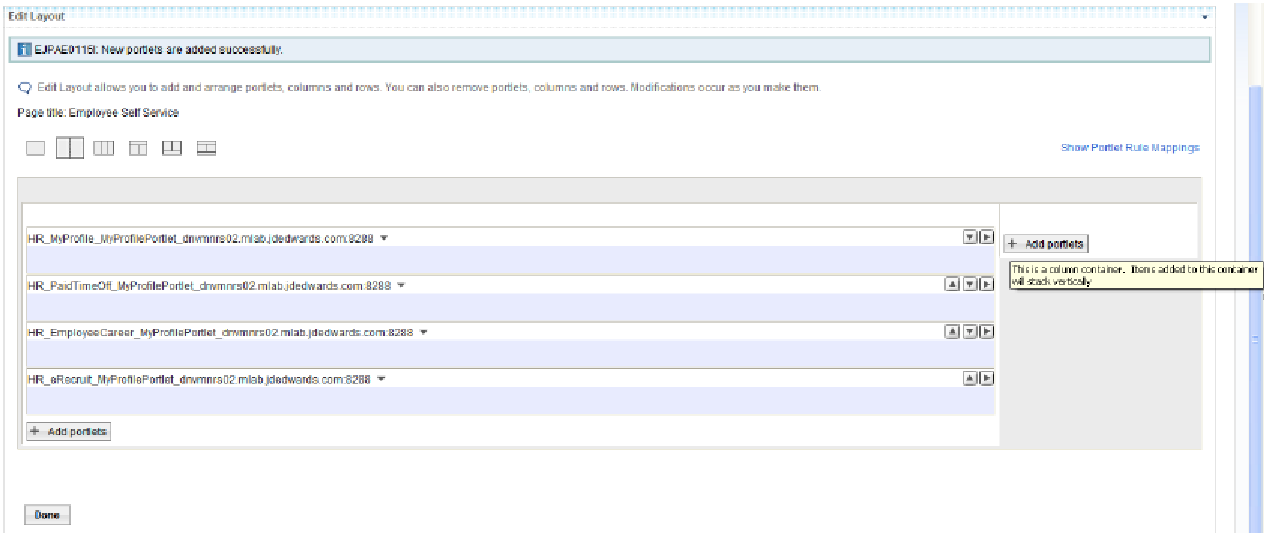
15. Search for "HR_EmployeeCareer", and then select the required "HR_ EmployeeCareer" portlet from the list and click "OK".



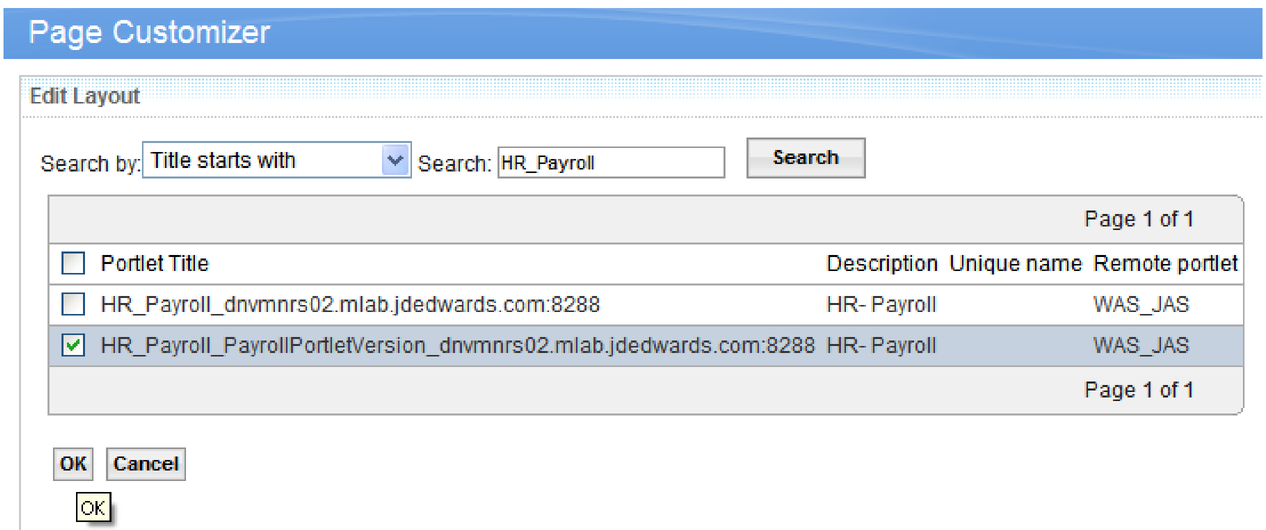
16. To add "HR_eRecruit" portlet, click "Add portlets" button.



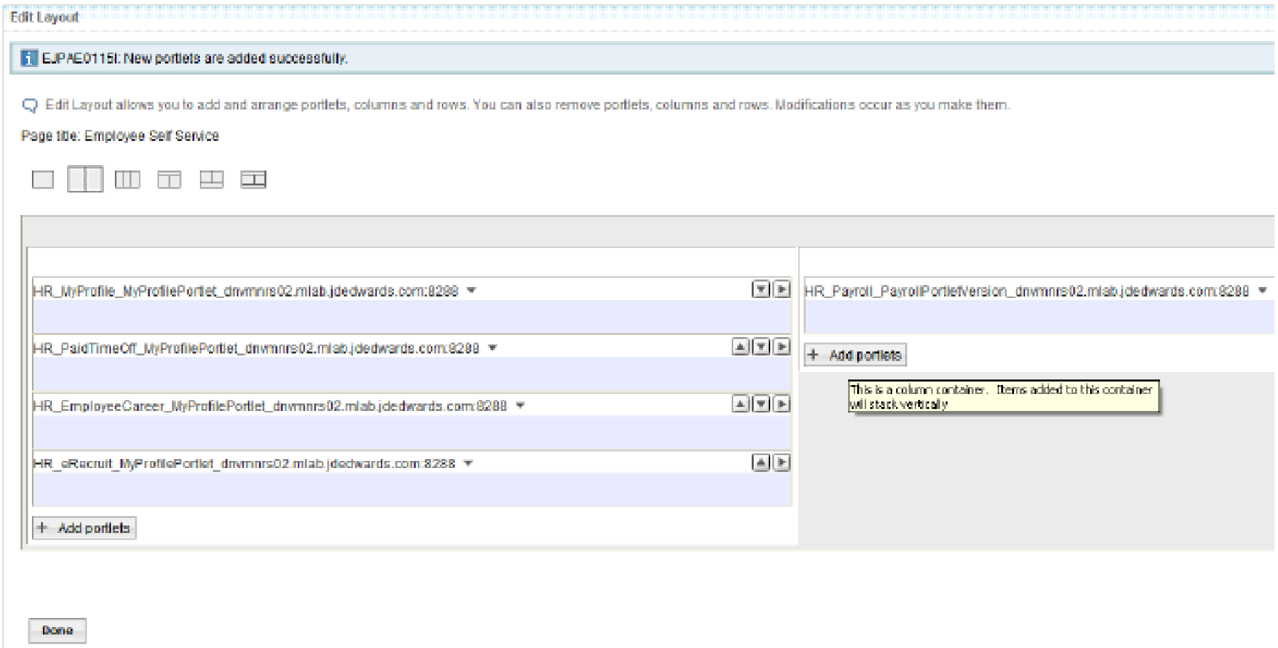
17. Search for "HR_eRecruit", and then select the required "HR_ eRecruit" portlet from the list and click "OK".



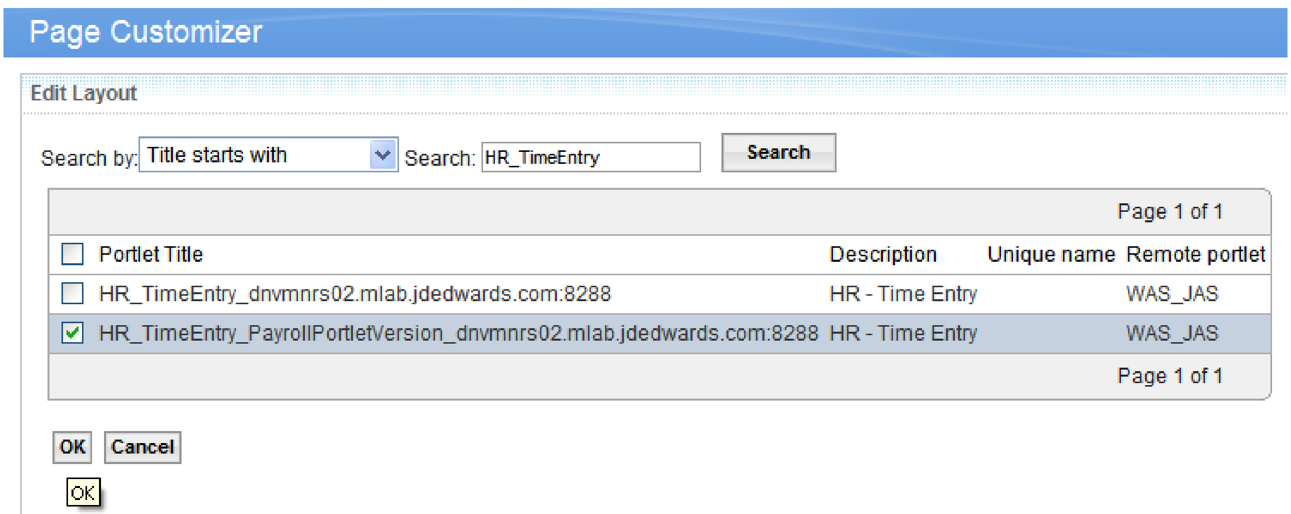
18. To add portlets to the right pane, click "Add portlets" on the right pane.



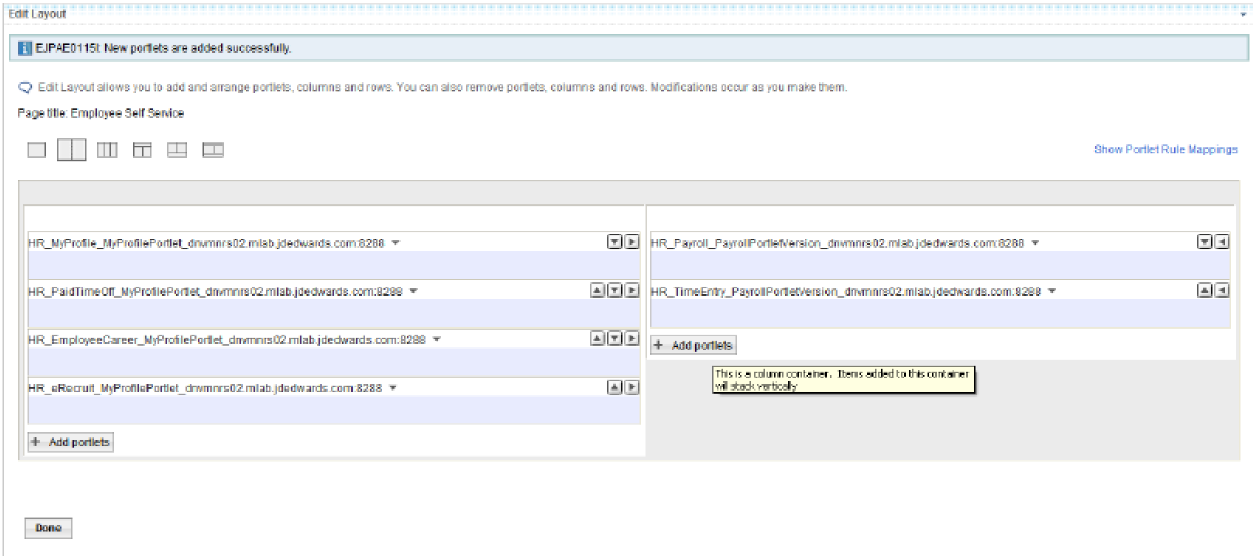
19. Search for "HR_Payroll", and then select the required "HR_ Payroll" portlet from the list and click "OK".



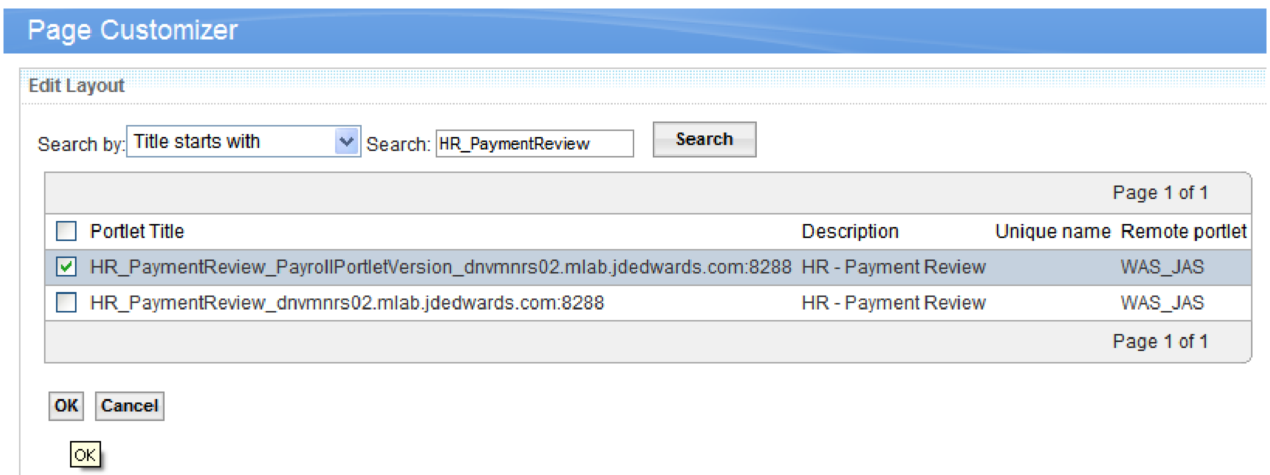
20. To add the "HR_ TimeEntry" portlet, click the "Add portlets" button.



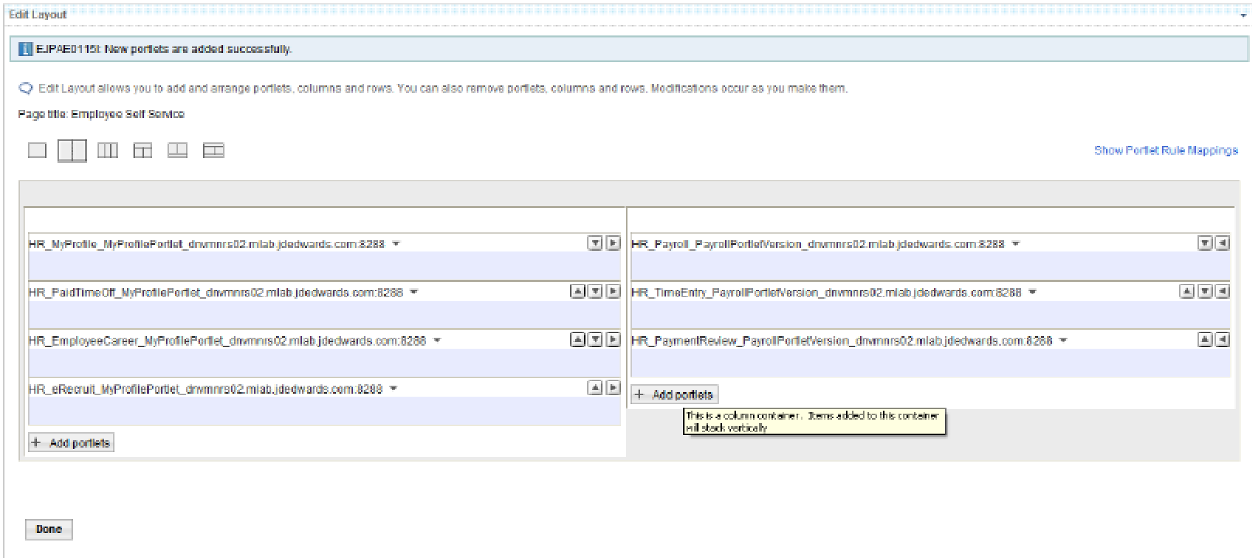
21. Search for "HR_ TimeEntry", and then select the required "HR_ TimeEntry" portlet from the list and click "OK".



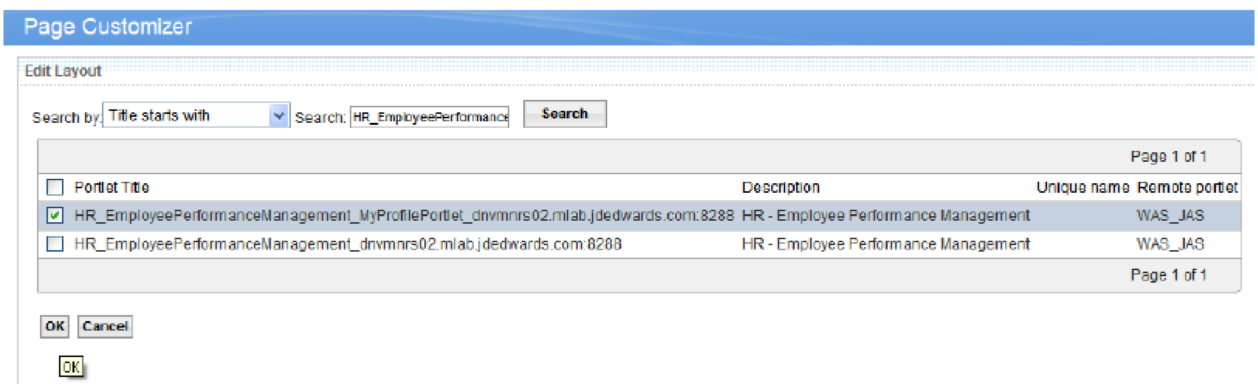
22. To add the "HR_ PaymentReview" portlet, click the "Add Portlets" button.



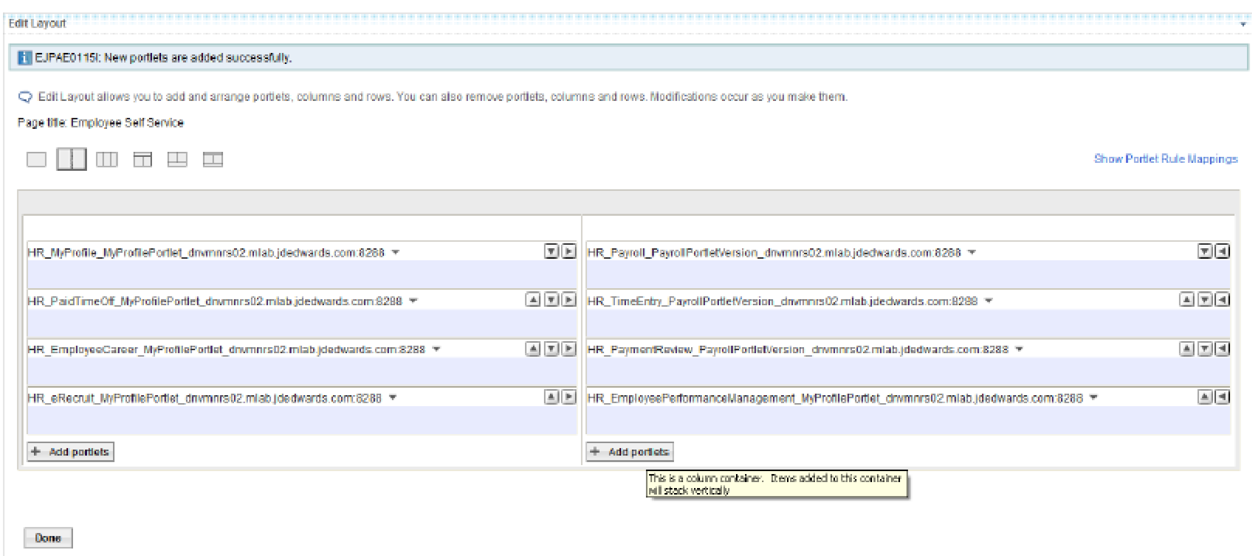
23. Search for "HR_ PaymentReview", and then select the required "HR_ PaymentReview" portlet from the list and click "OK".



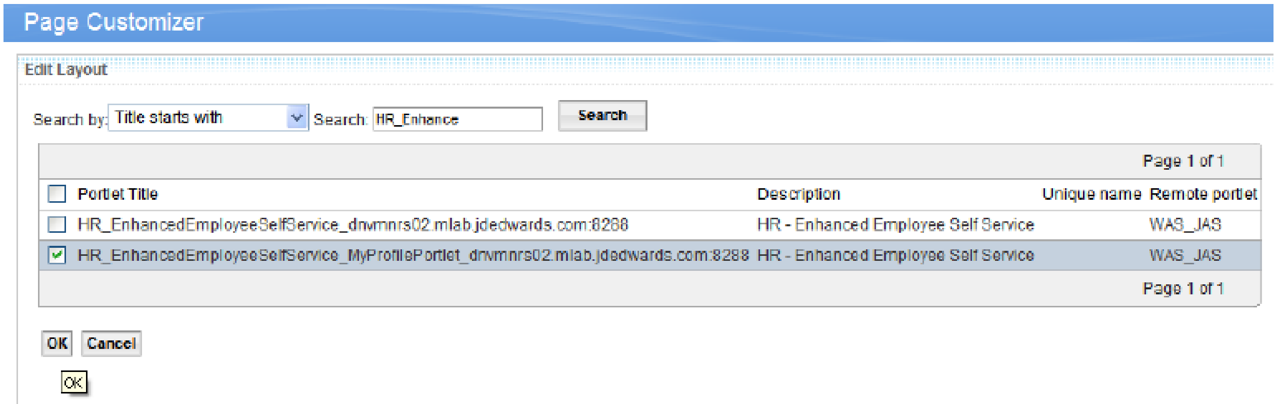
24. To add "HR_ EmployeePerformanceManagement" portlet click the "Add portlets" button.



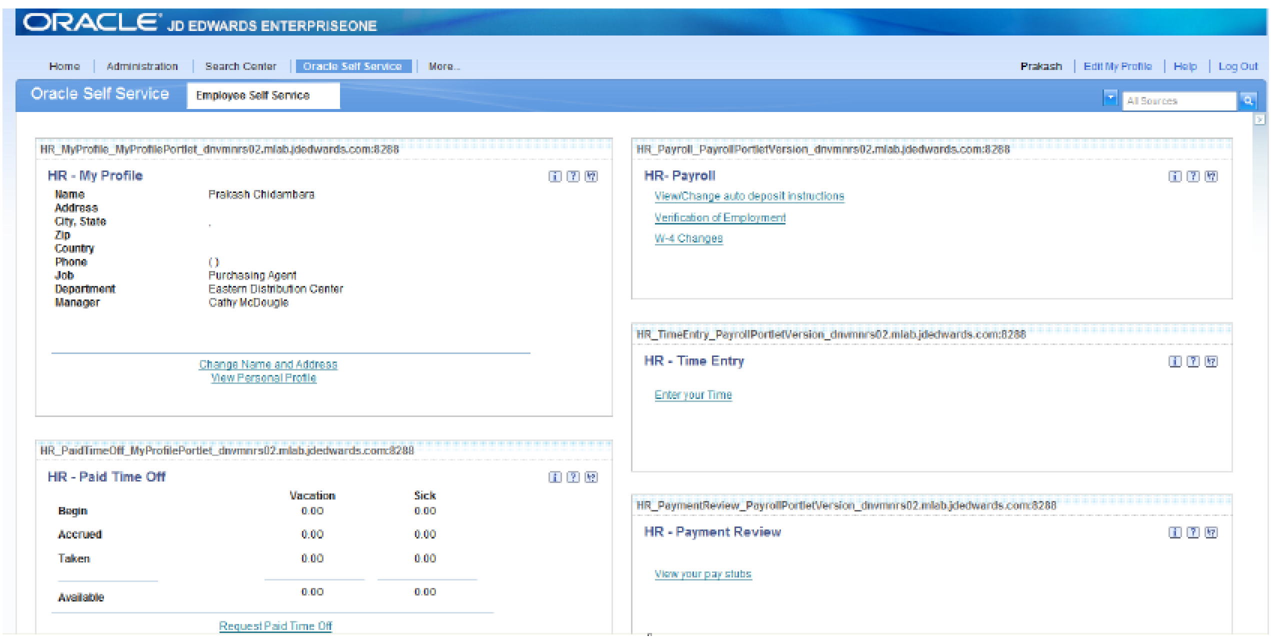
25. Search for "HR_ EmployeePerformance", and then select the required "HR_ EmployeePerformanceManagement" portlet from the list and click "OK".

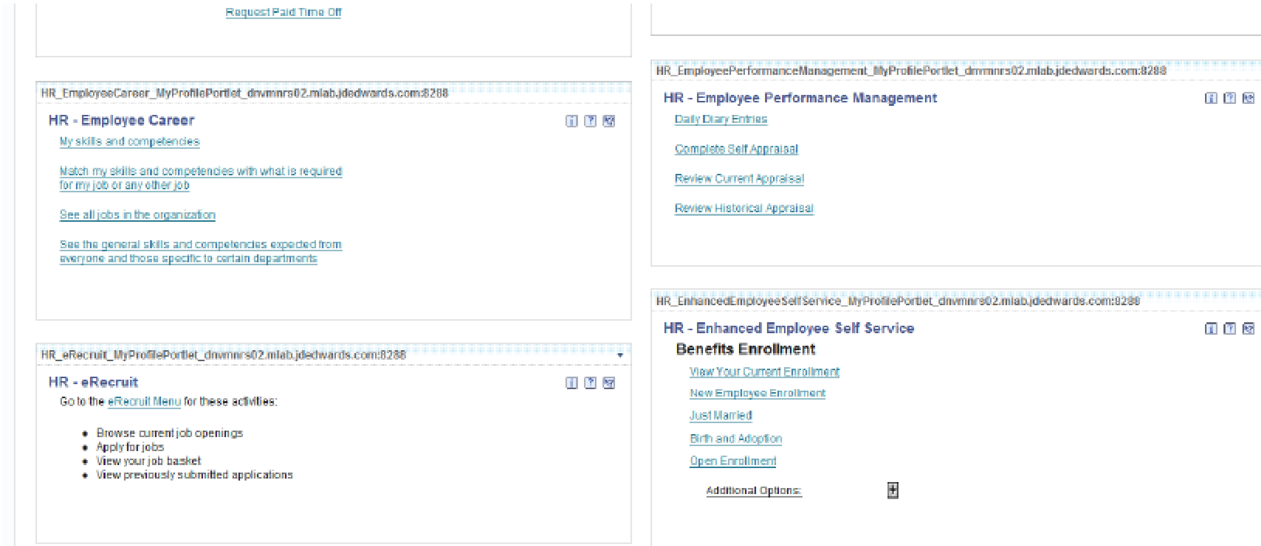


26. To add "HR_ EnhancedEmployeeSelfService" portlet, click the "Add portlets" button.



27. Search for "HR_ Enhance", and then select the required "HR_ EnhancedEmployeeSelfService" portlet from the list and click "OK".

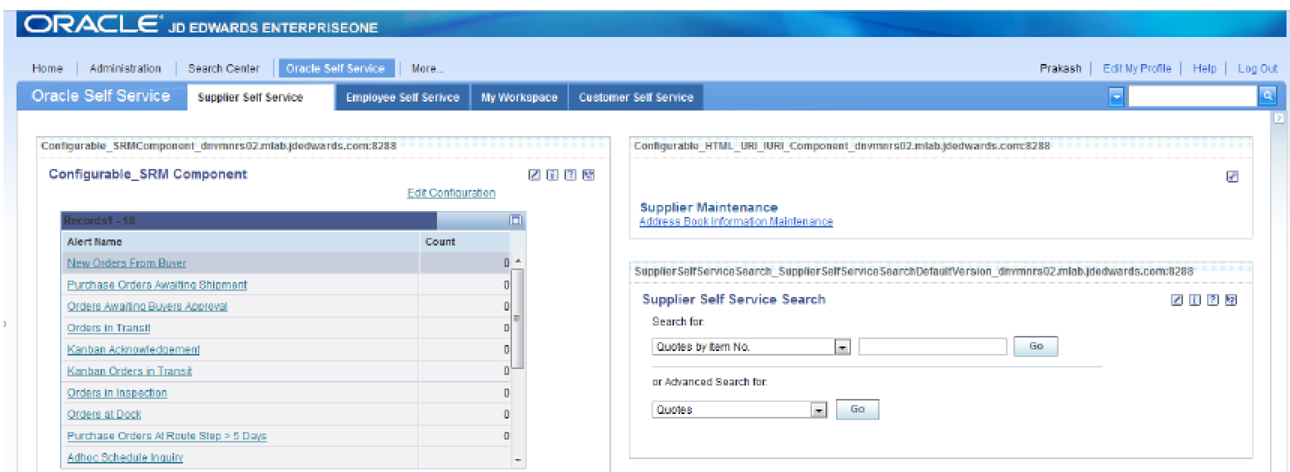




28. Above are the Employee Self-Service portlets.

9.5 Creating a Supplier Self-Service Page

In this section we will create a Supplier Self Service portal page.

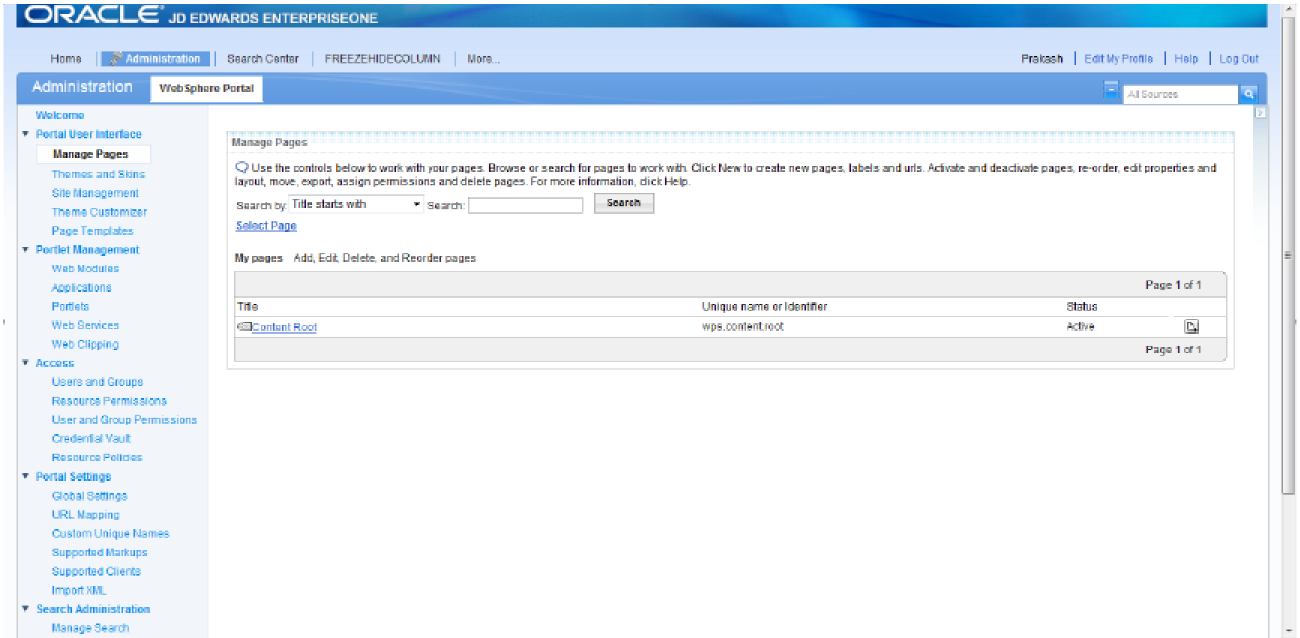


Follow these steps to create the Supplier Self Service page:

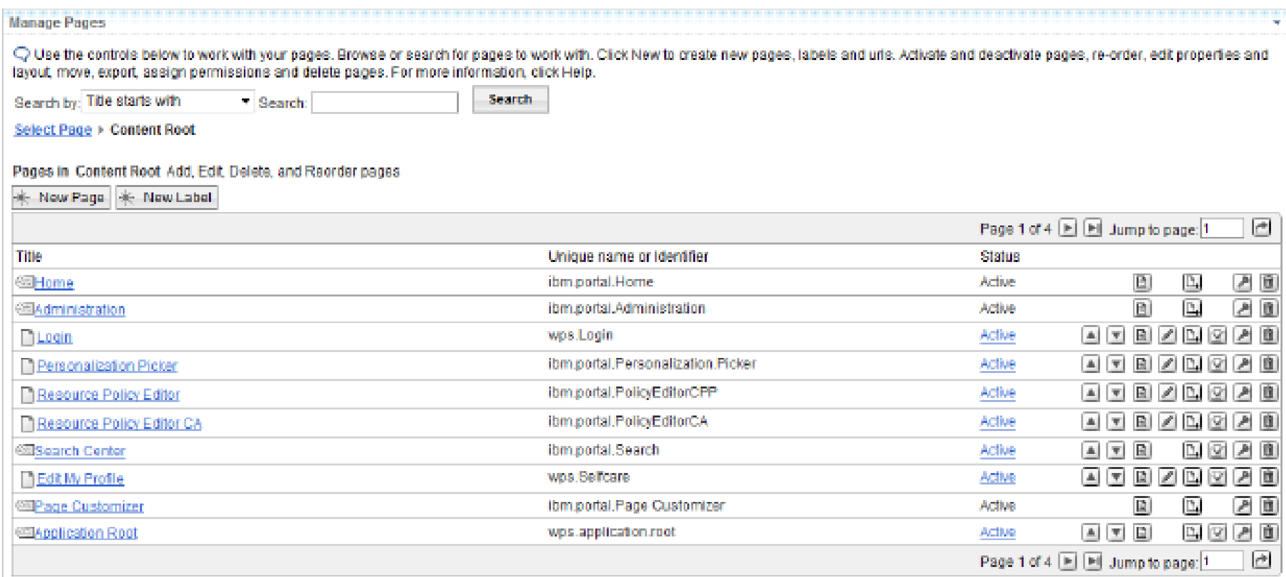
1. Login into Collaborative Portal using the user name and password provided to you. If you do not have user name and password, register yourself.

   Your user name for the portal you are using must match the user name for the E1 environment that the portlets are running on.

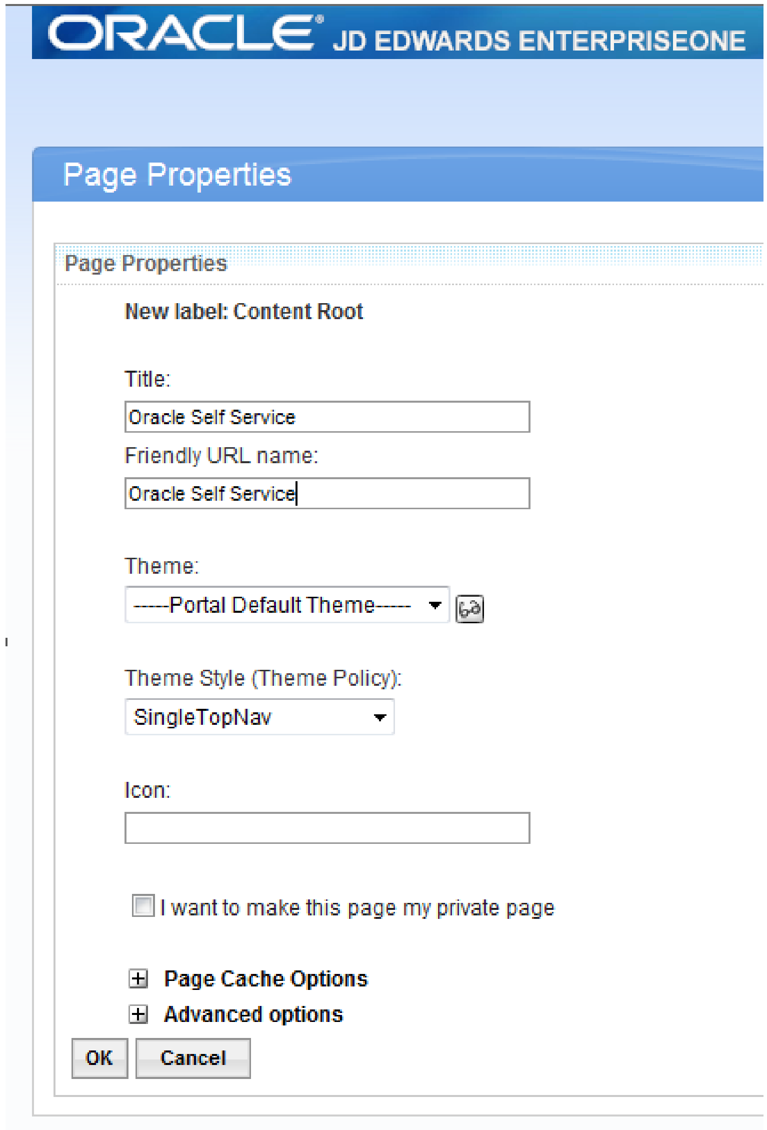
   E.g. User name and password for PY900 is AB232323 so the portal user name and password for the WebCenter/Collaborative Portal running PY900 portlets must be AB232323.



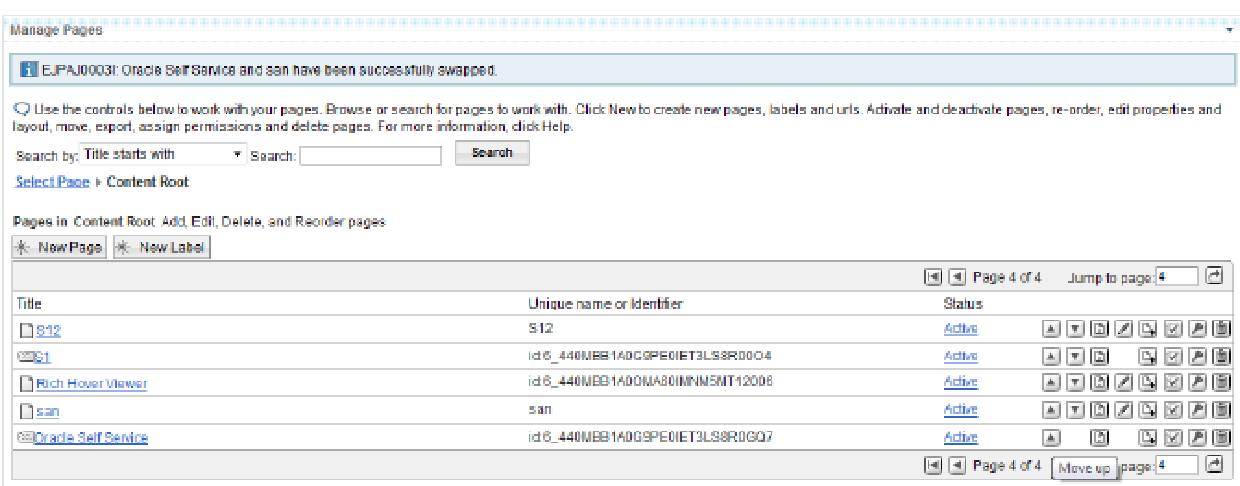
2. Select "Content Root" from Manage Pages present under the Administration tab.

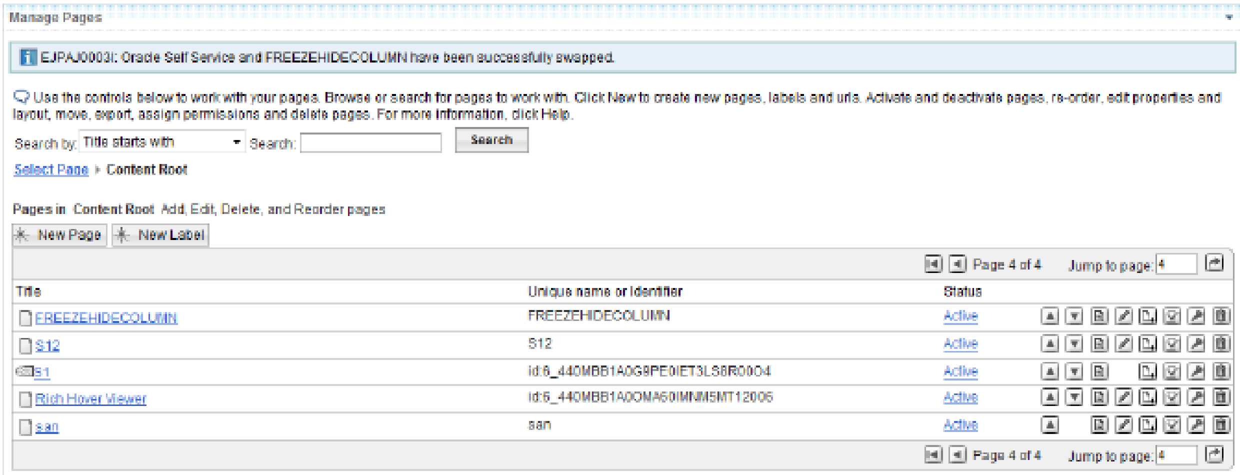


3. Click the "New Label" button.

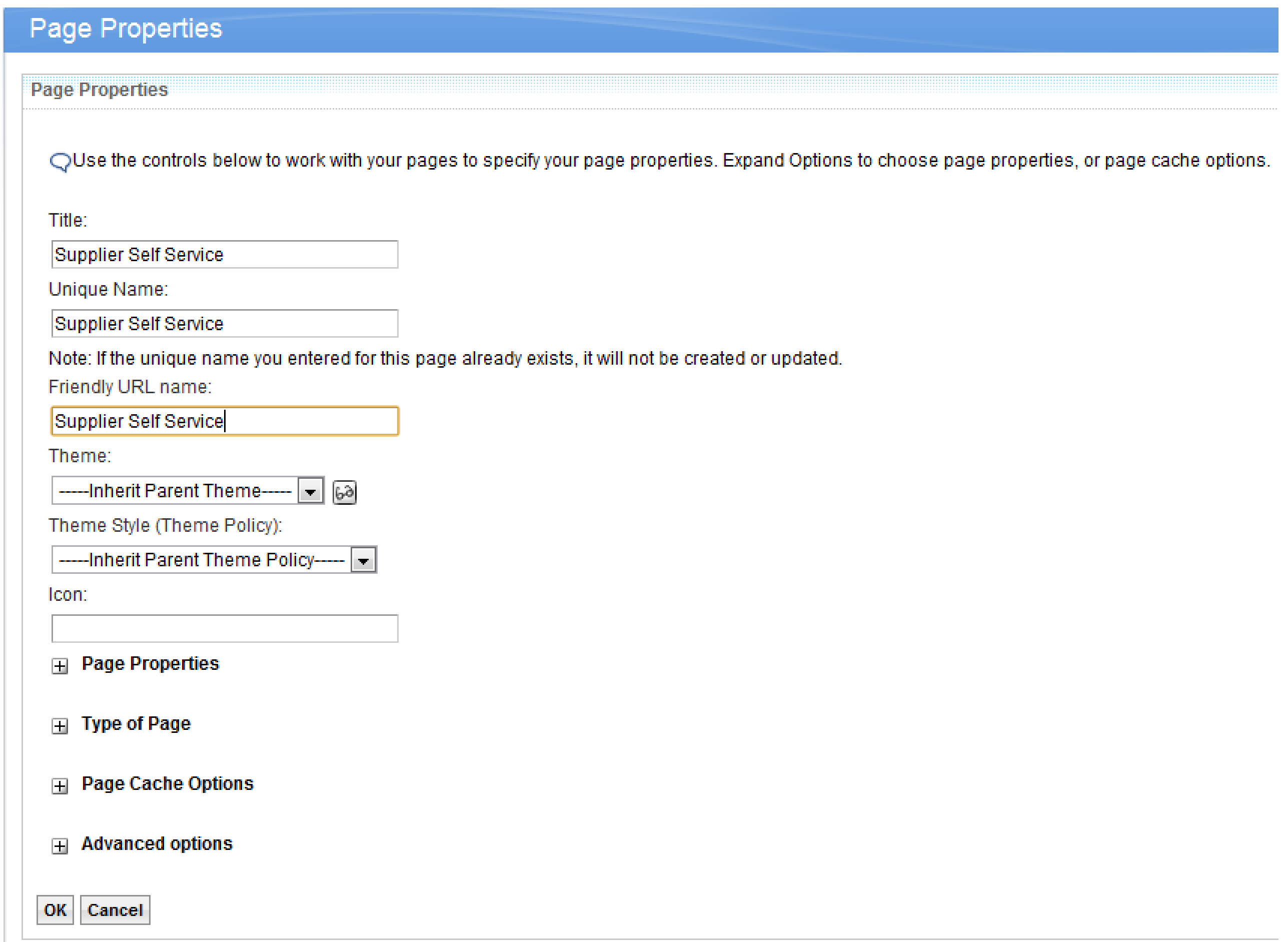


4. Fill in the Page Properties and click the "OK" button.

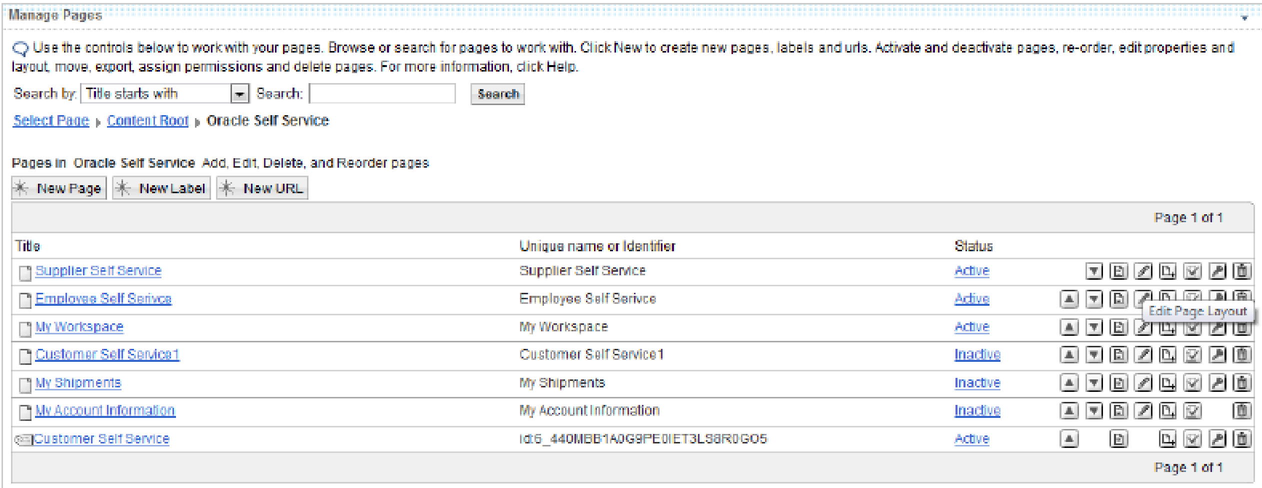




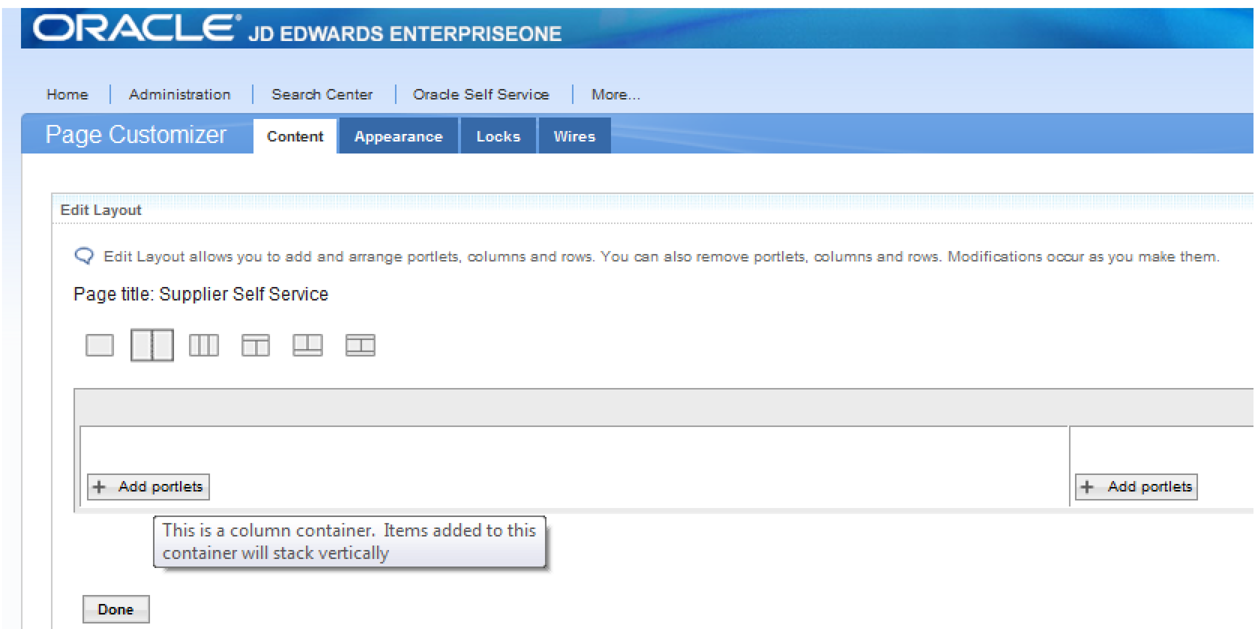
5. If the new label created is not visible in the tabs, the user can make it visible by moving the page created up to the queue so that the created label will be visible in the tabs.



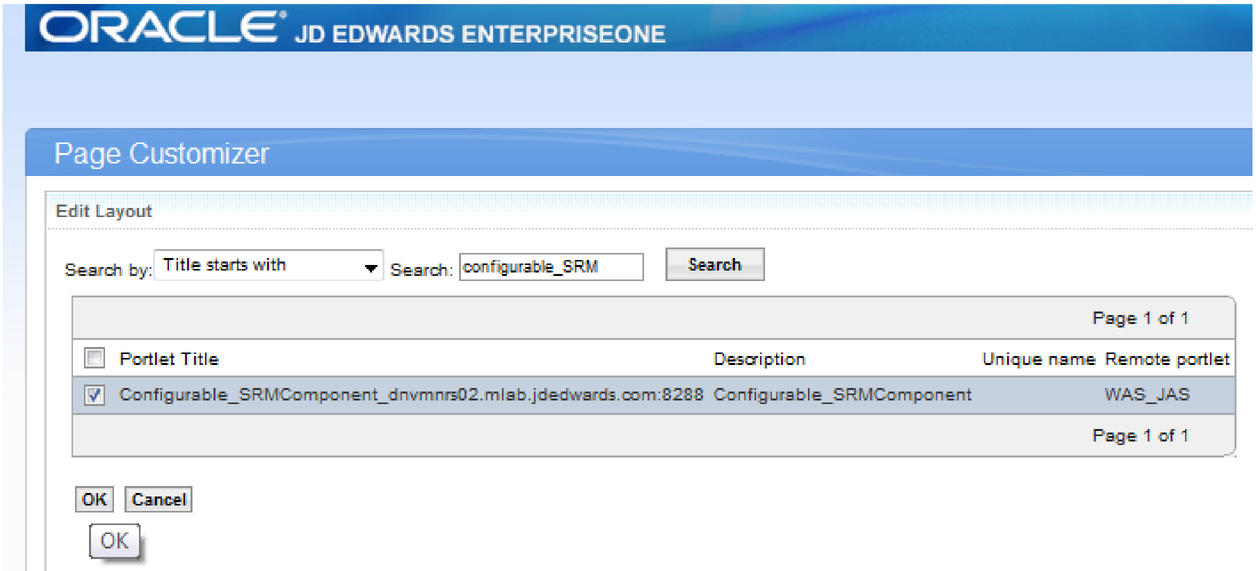
6. Click the “New Page” button and fill in the Page Properties and click the “OK” button.



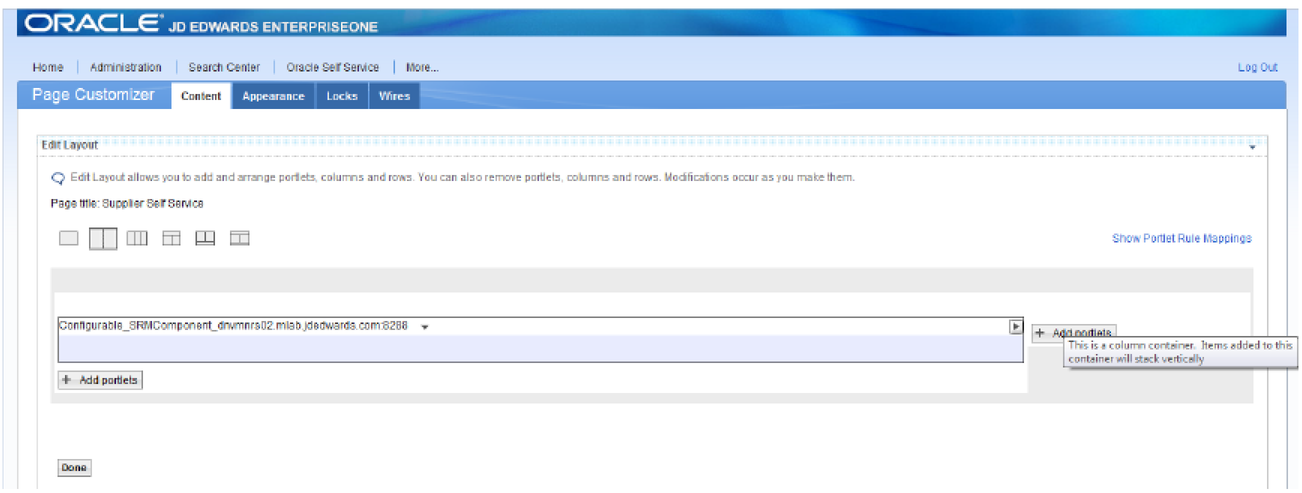
7. Click the "Edit Page Layout" button.



8. Select the second layout and click the "Add portlets" button on the left pane.

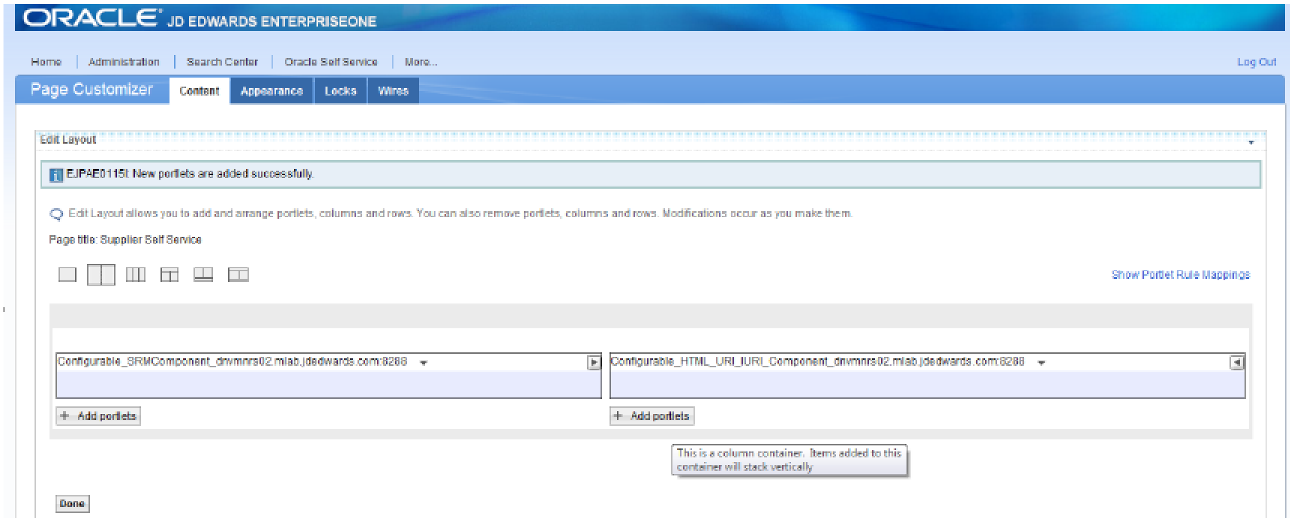


9. To add the Configurable_SRMComponent portlet to the left pane, search for the string "Configurable_SRMComponent" in order to find the list of Configurable_SRMComponent portlets available. Then select the portlet and click the OK button.

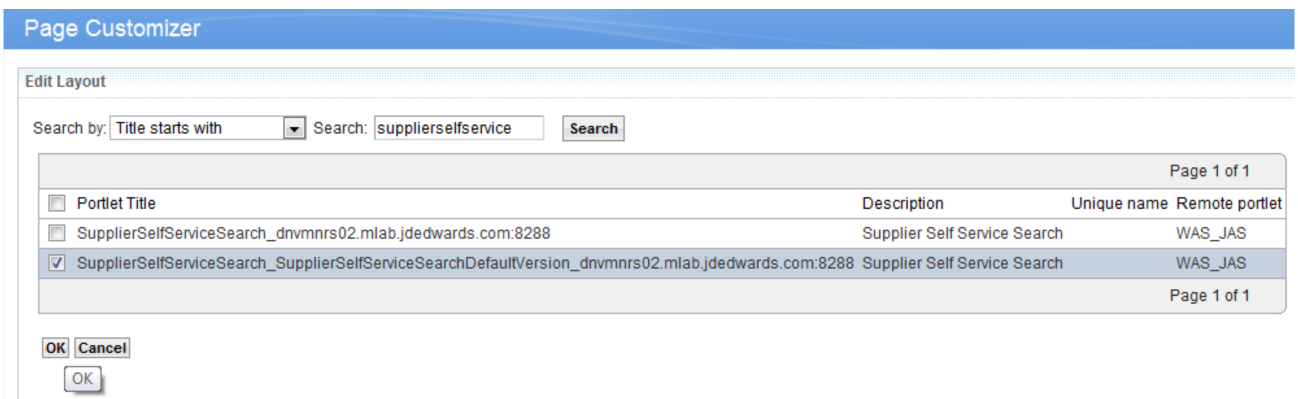


10. Click the "Add Portlets" button on the right pane.

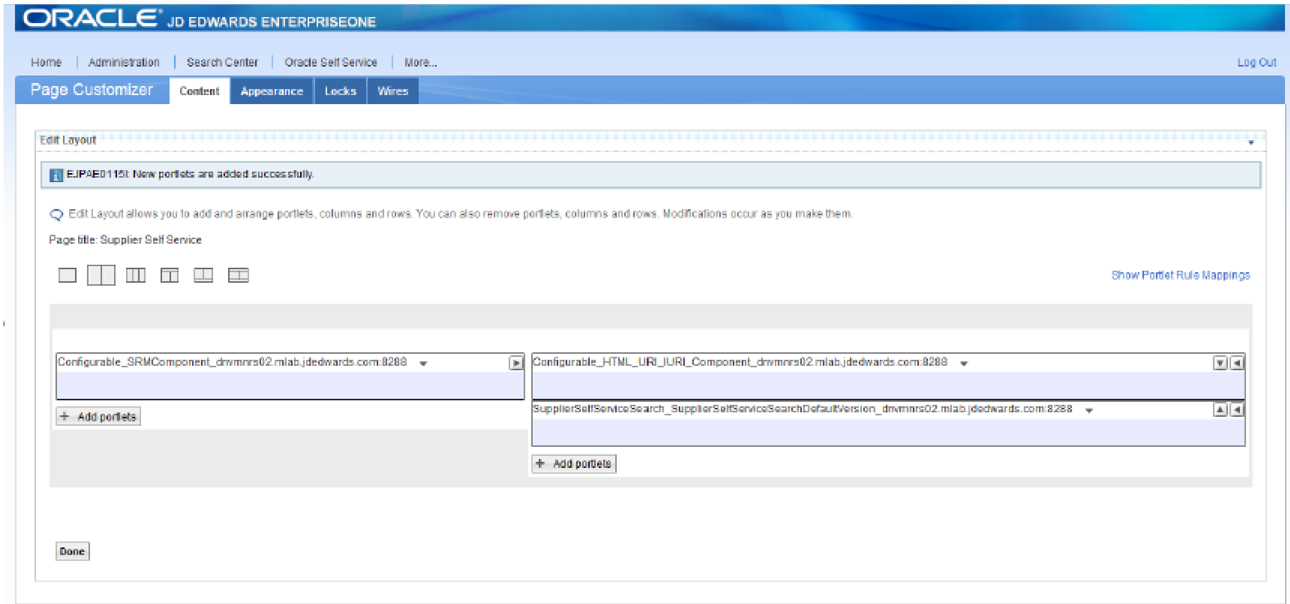
11. To add the Configurable_HTML_URI_IURI_Component portlet to the right pane, search for the string "Configurable_HTML_URI_IURI_Component" to find the list of Configurable_HTML_URI_IURI_Component portlets available. Then select and click the OK button.



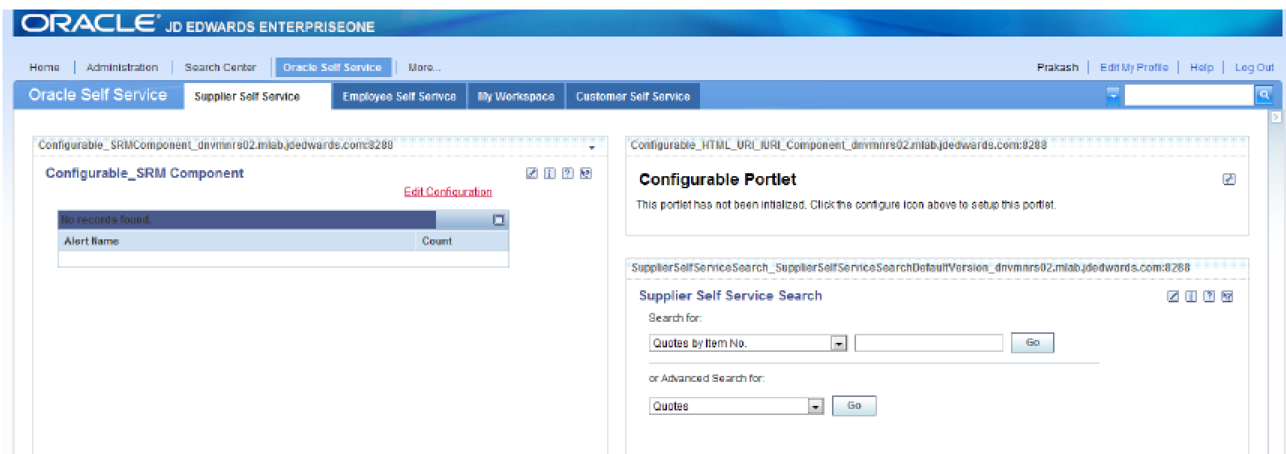
12. Click the "Add Portlets" button on the right pane.



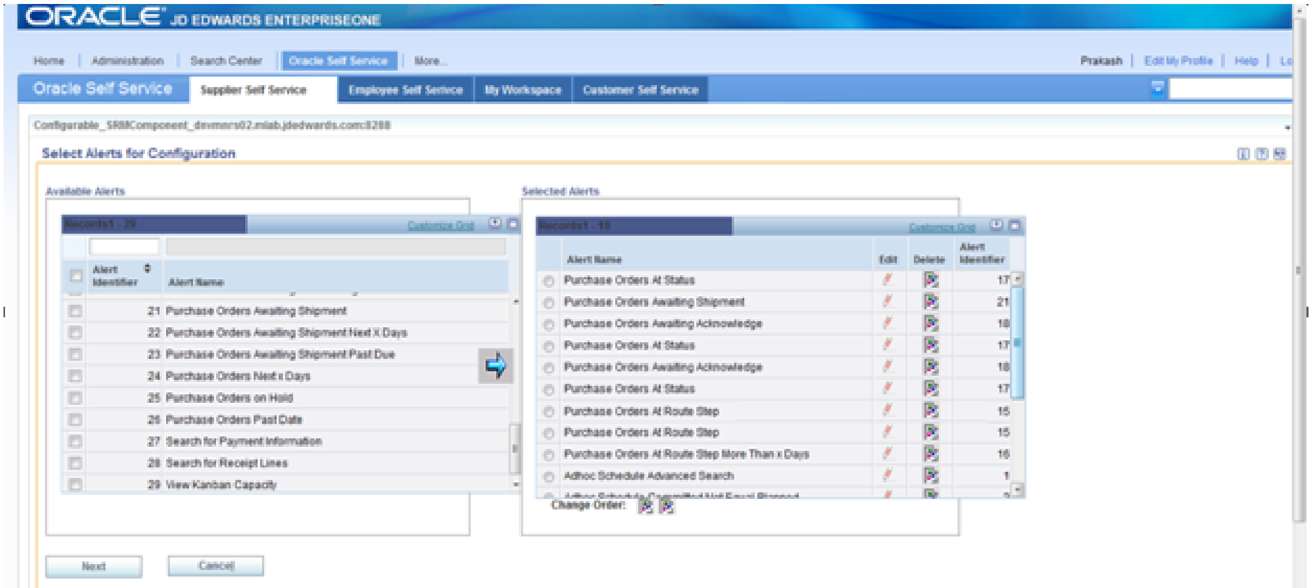
13. To add the Supplier Self Service Search portlet to the right pane, search for the string "Supplier Self Service Search" to find the list of Supplier Self Service Search portlets available. Then select and click the OK button.

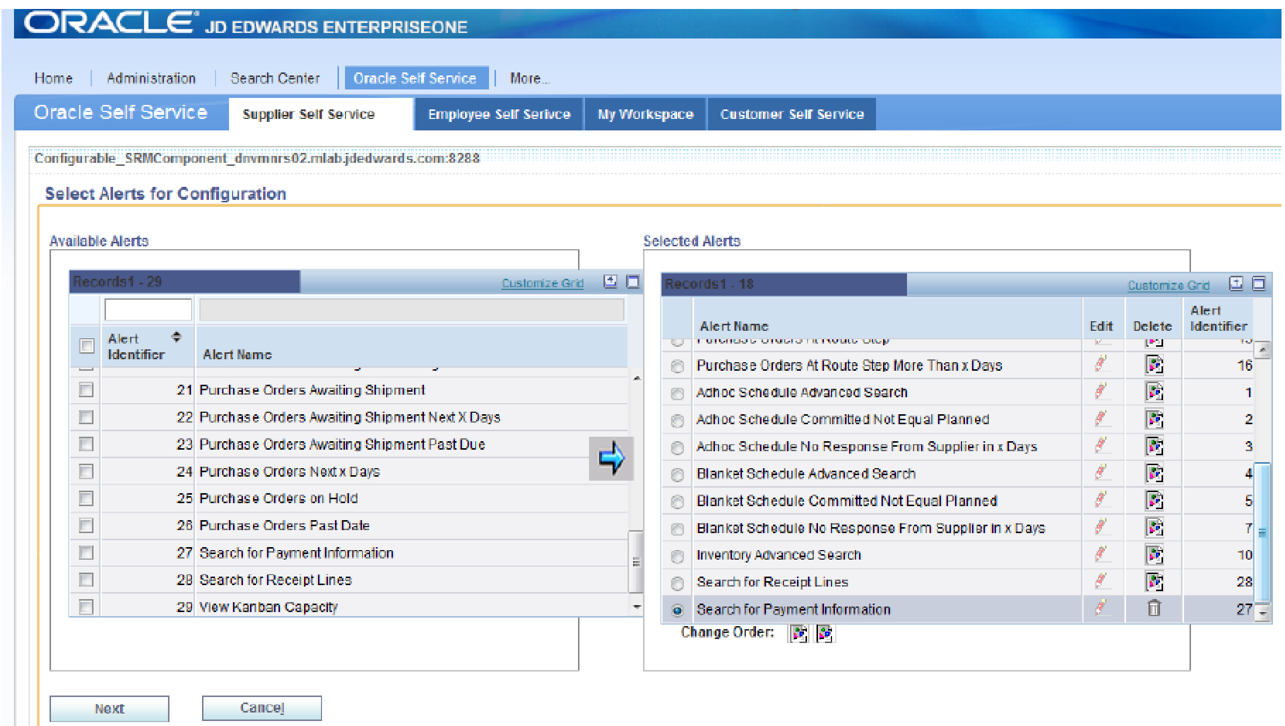


14. Click the "Done" button after adding all the three portlets.

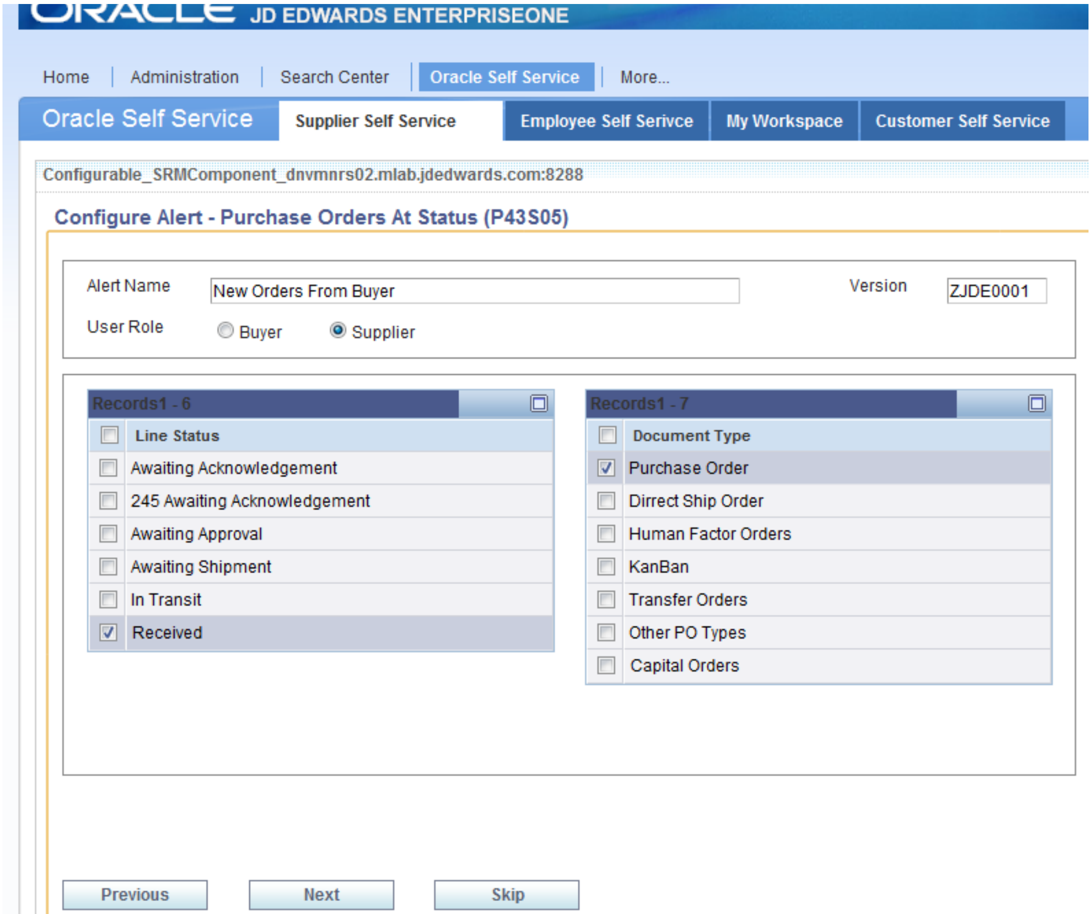


15. Select the Supplier Self Service tab from Oracle Self Service and click the Edit Configuration link.





16. Add the alerts from the Available Alerts grid to the Selected Alerts grid.



17. Click on “Next”. This will allow the user to override all of the alert names as desired.

    The follow images display the alert name overrides.

Figure 9–16 Purchase Orders Awaiting Shipment Alert

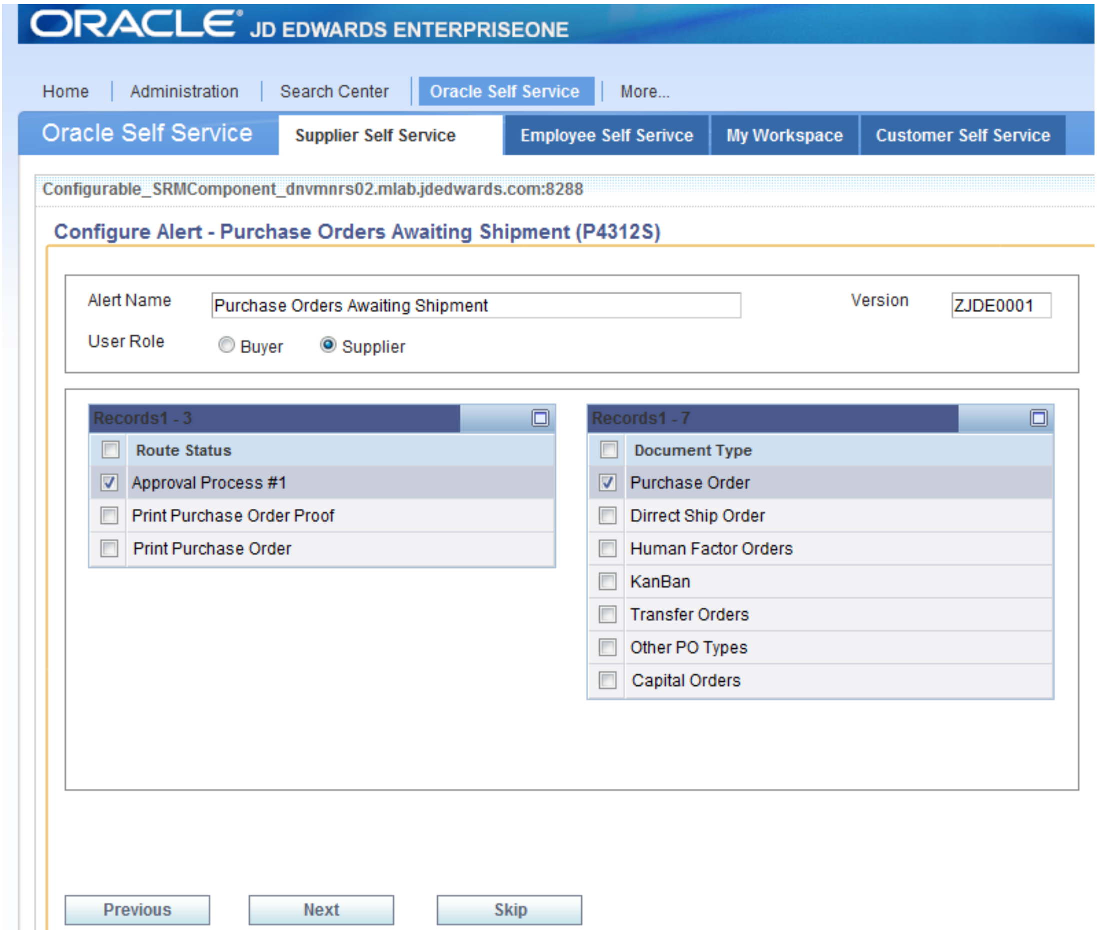


Figure 9–17 Purchase Orders At Status Alert

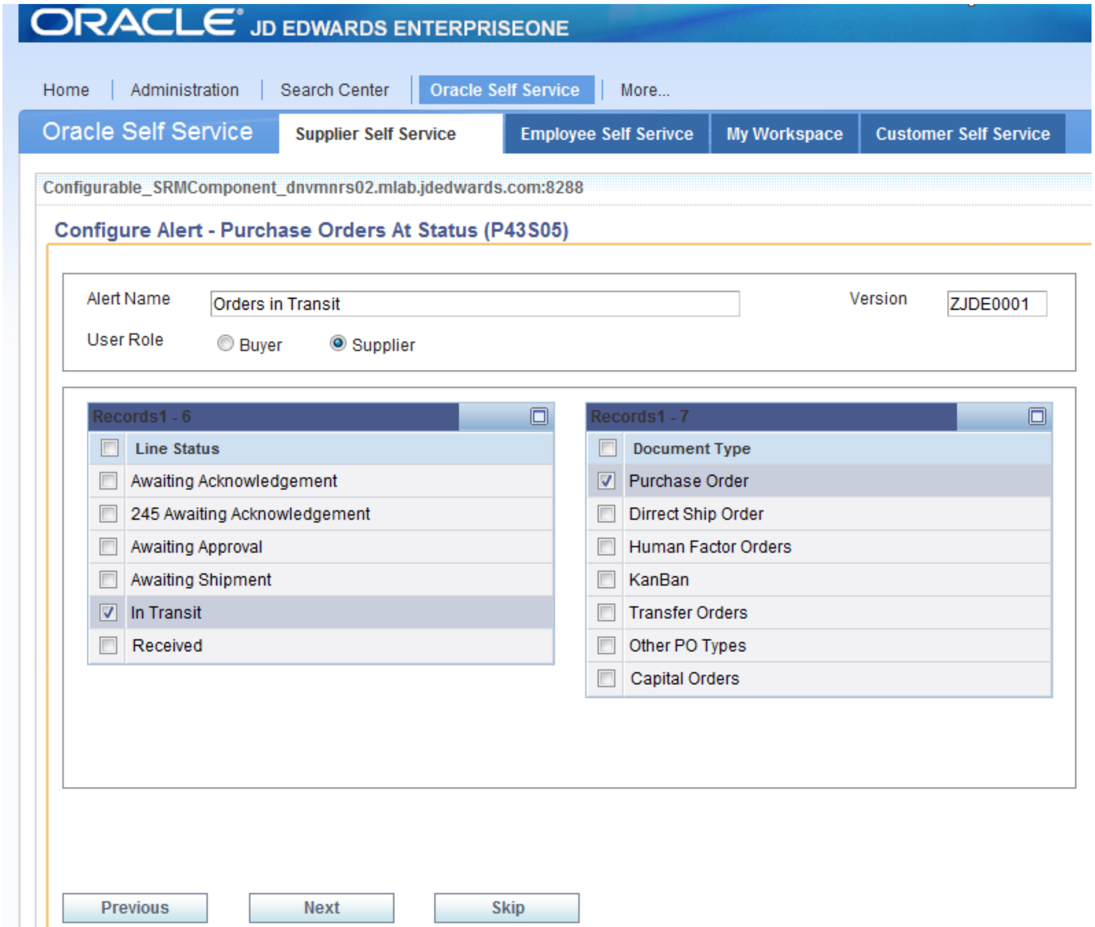


Figure 9–18 Purchase Orders Awaiting Acknowledge Alert

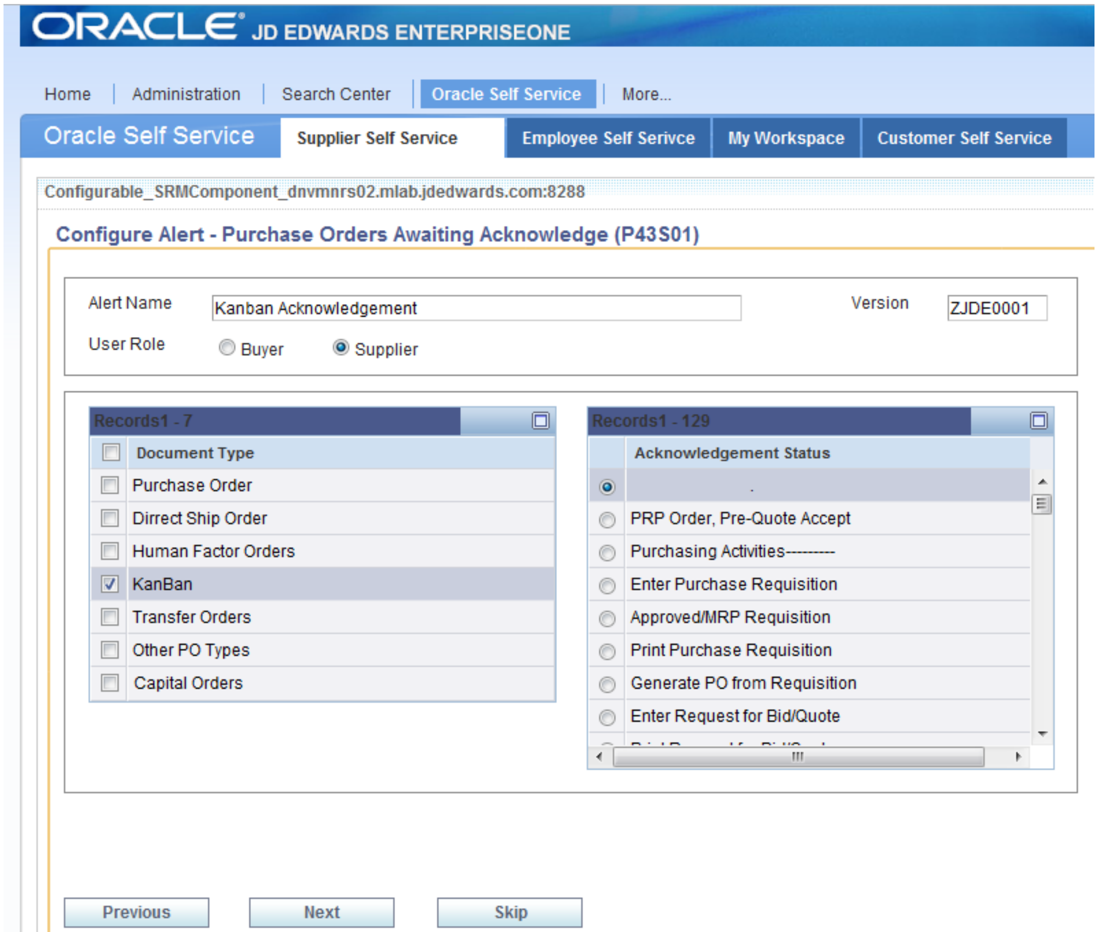


Figure 9–19 Purchase Orders At Status Alert

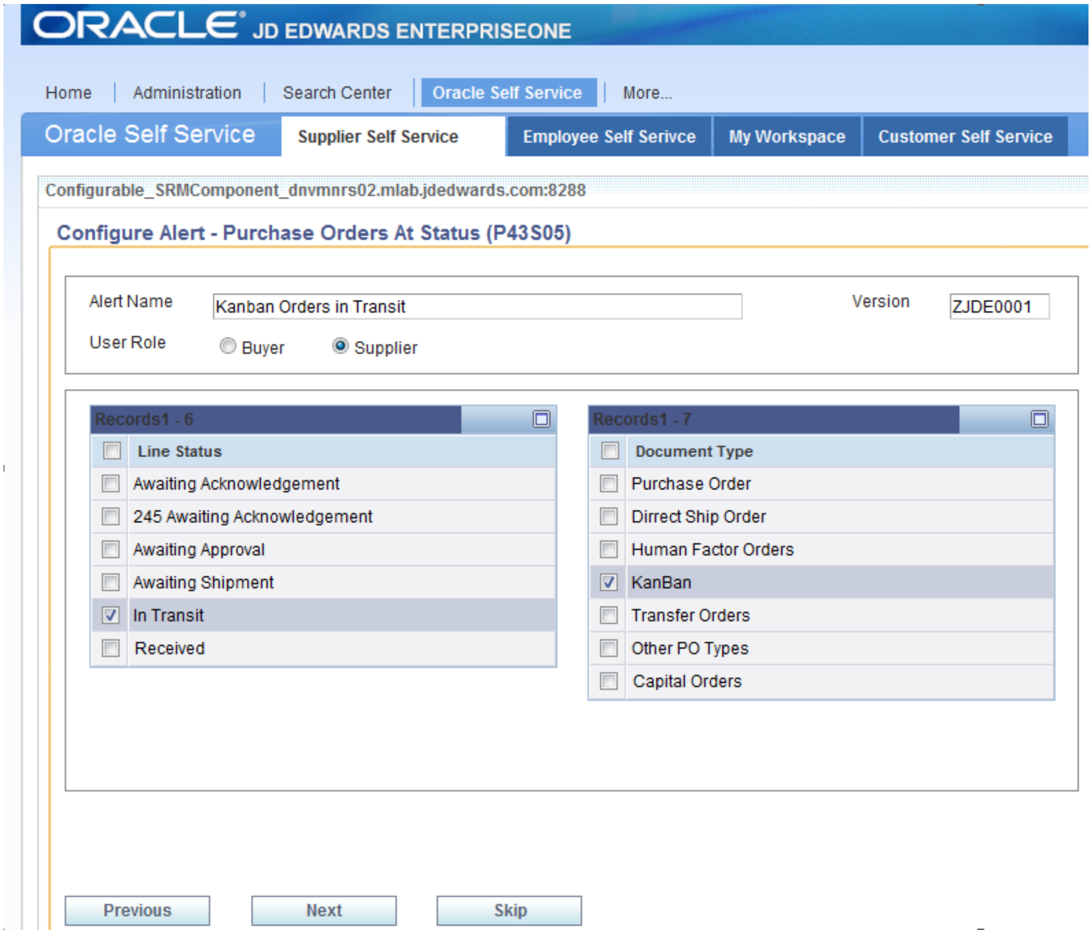


Figure 9–20 Purchase Orders At Route Step Alert

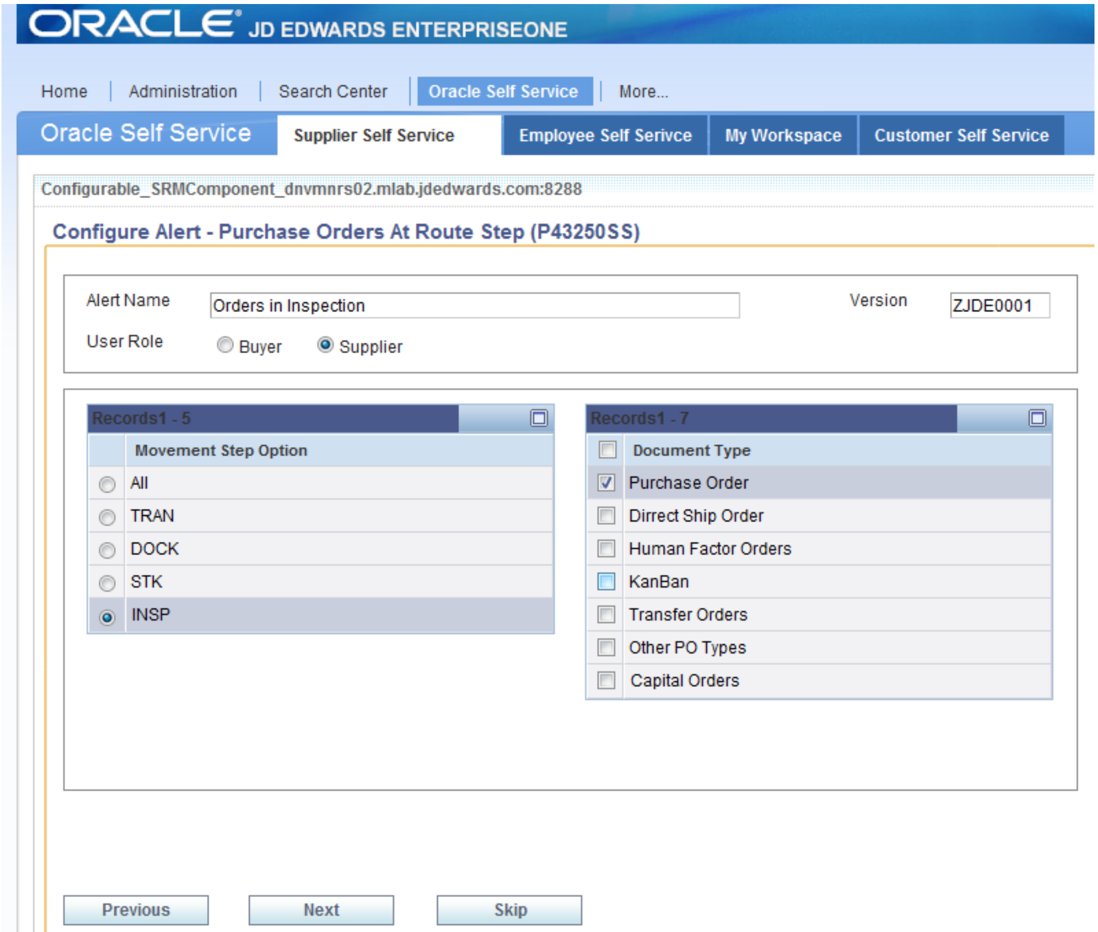


Figure 9–21 Purchase Orders At Route Step Alert

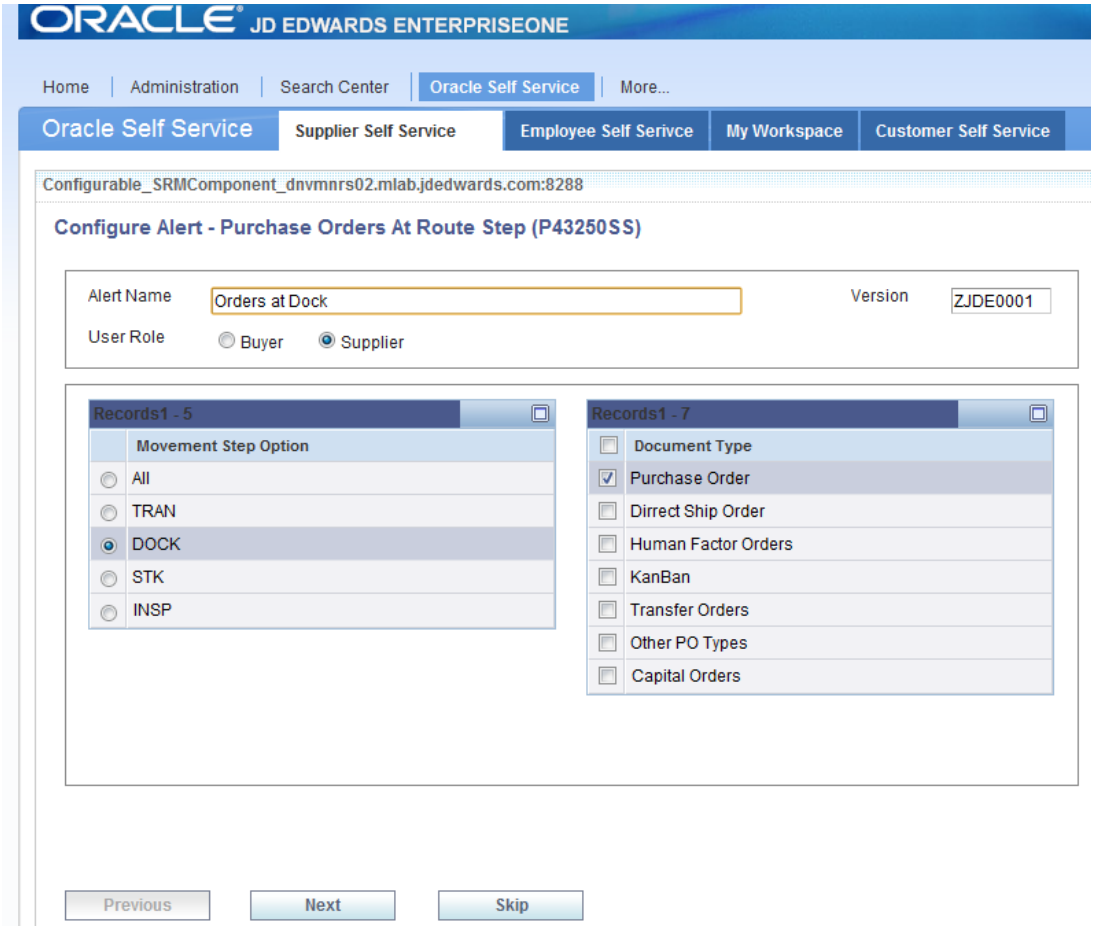


Figure 9–22 Purchase Orders At Route Step More Than X Days Alert

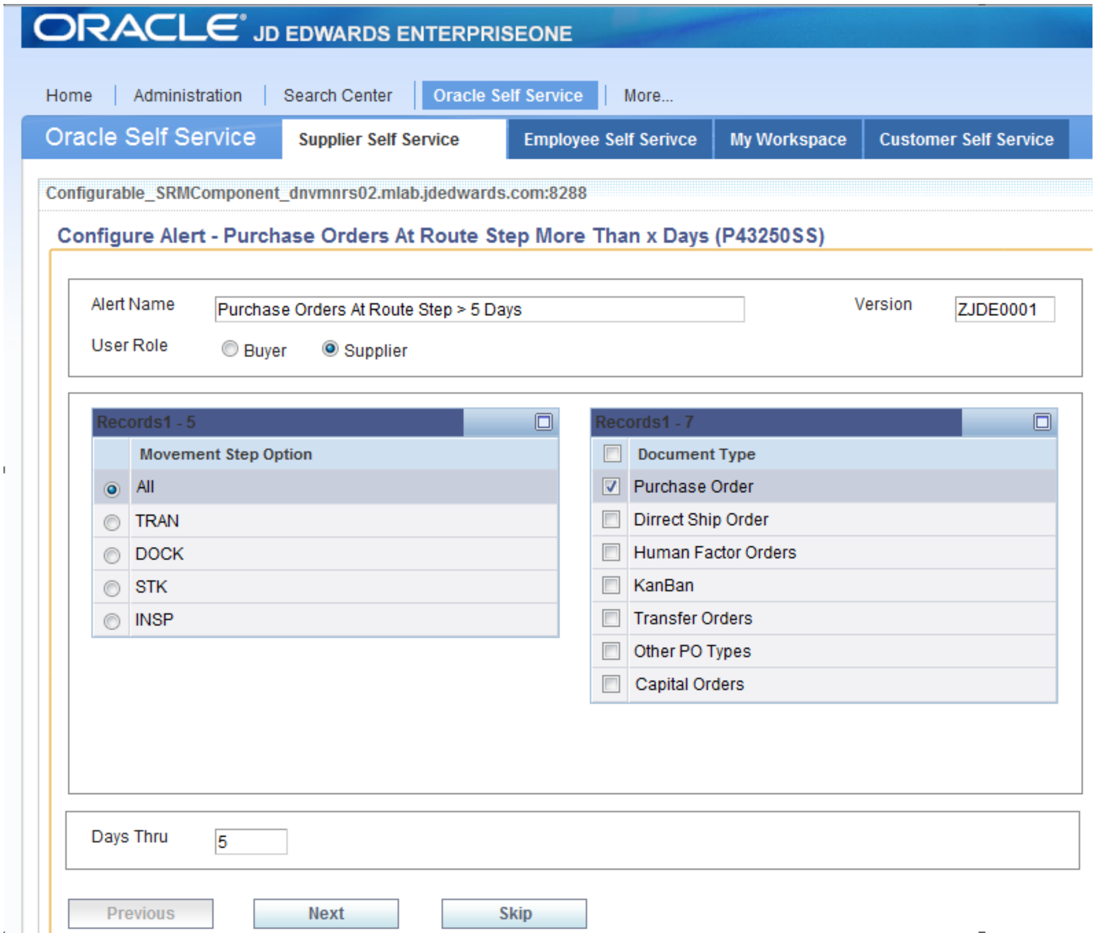


Figure 9–23 Adhoc Schedule Advanced Search Alert

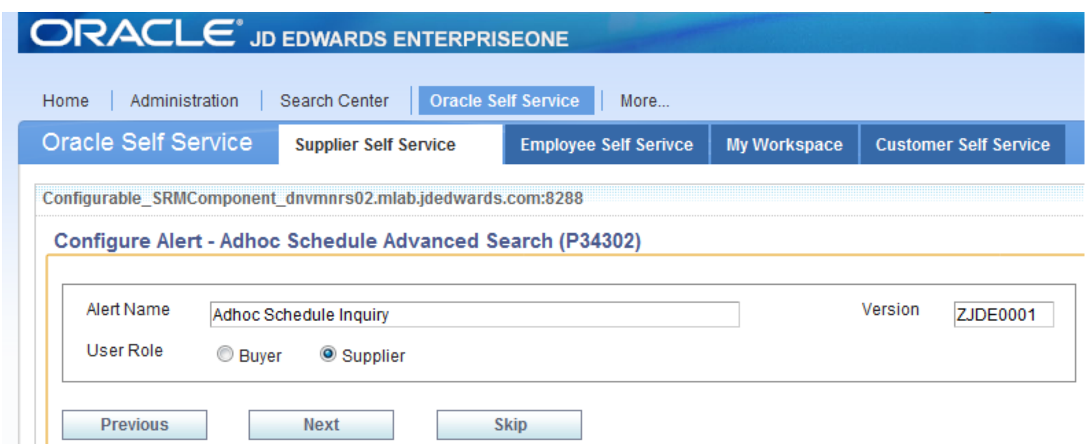


Figure 9–24 Adhoc Schedule Committed Note Equal Planned Alert

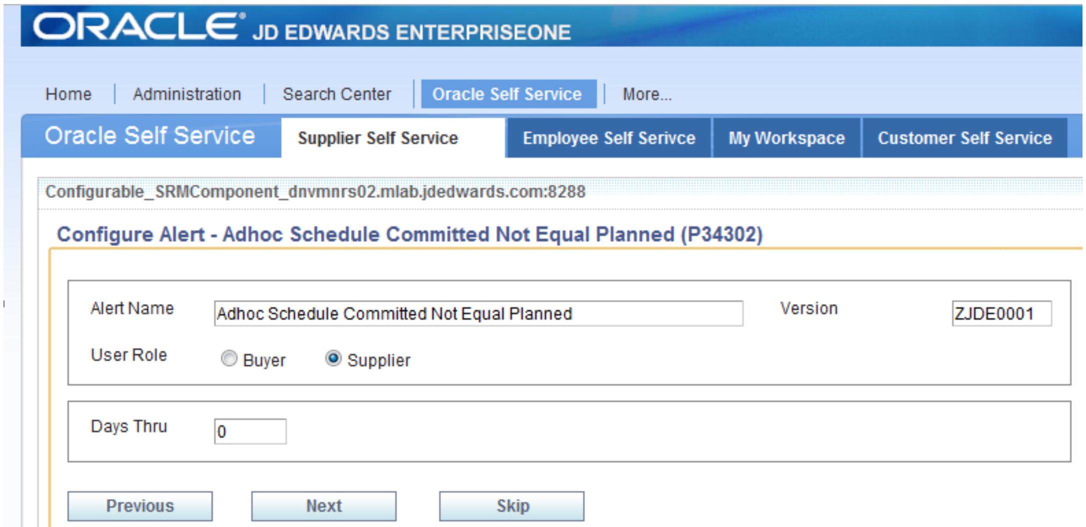


Figure 9–25 Adhoc Schedule No Response From Supplier in X Days Alert

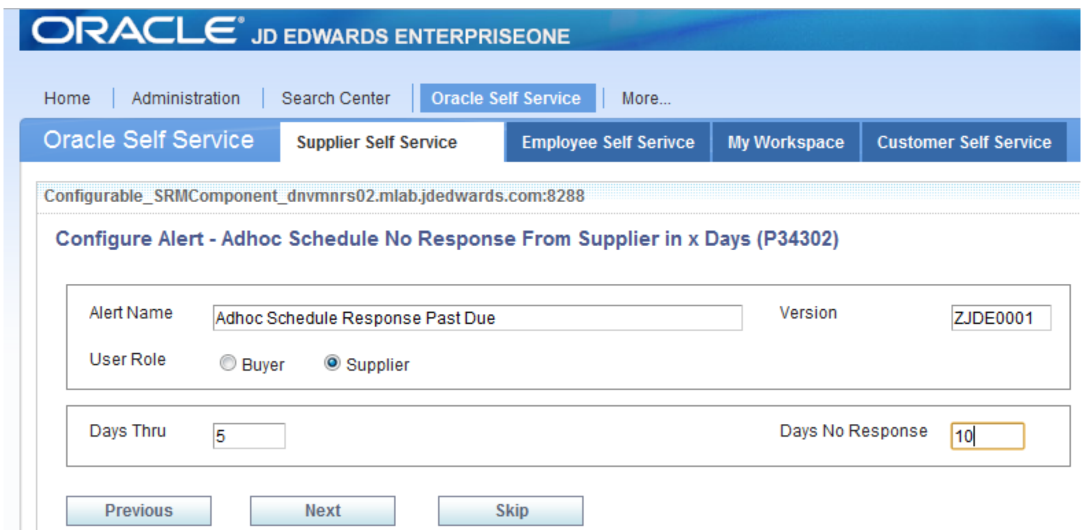


Figure 9–26 Blanket Schedule Advanced Search Alert

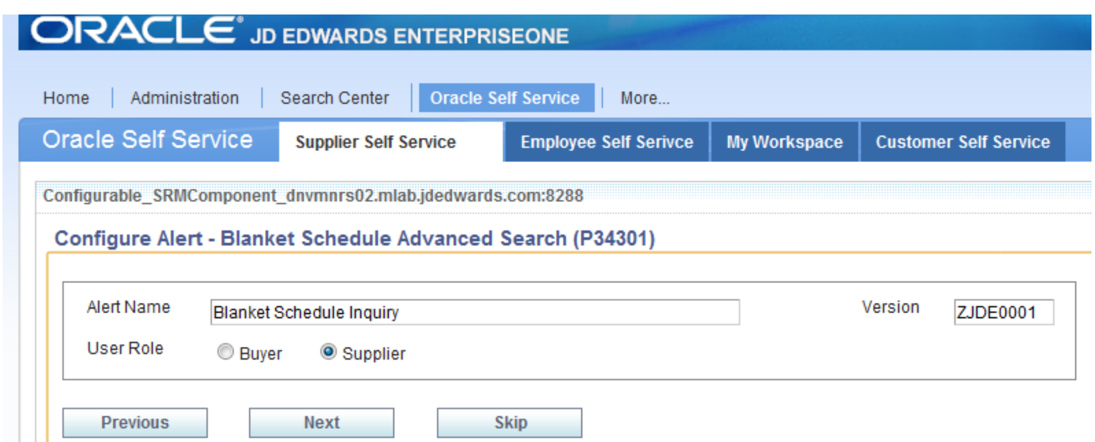


Figure 9–27 Blanket Schedule Committed Not Equal Planned Alert

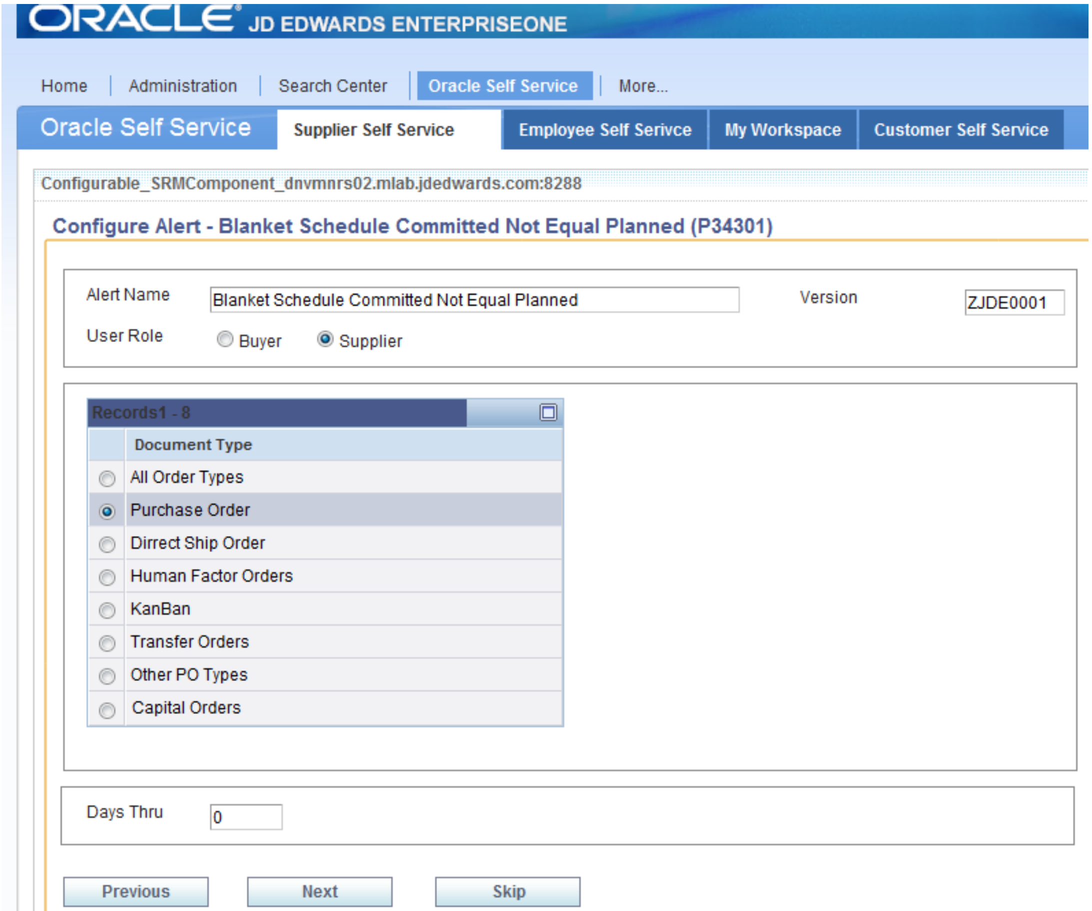


Figure 9–28   Blanket Schedule No Response From Supplier in X Days Alert

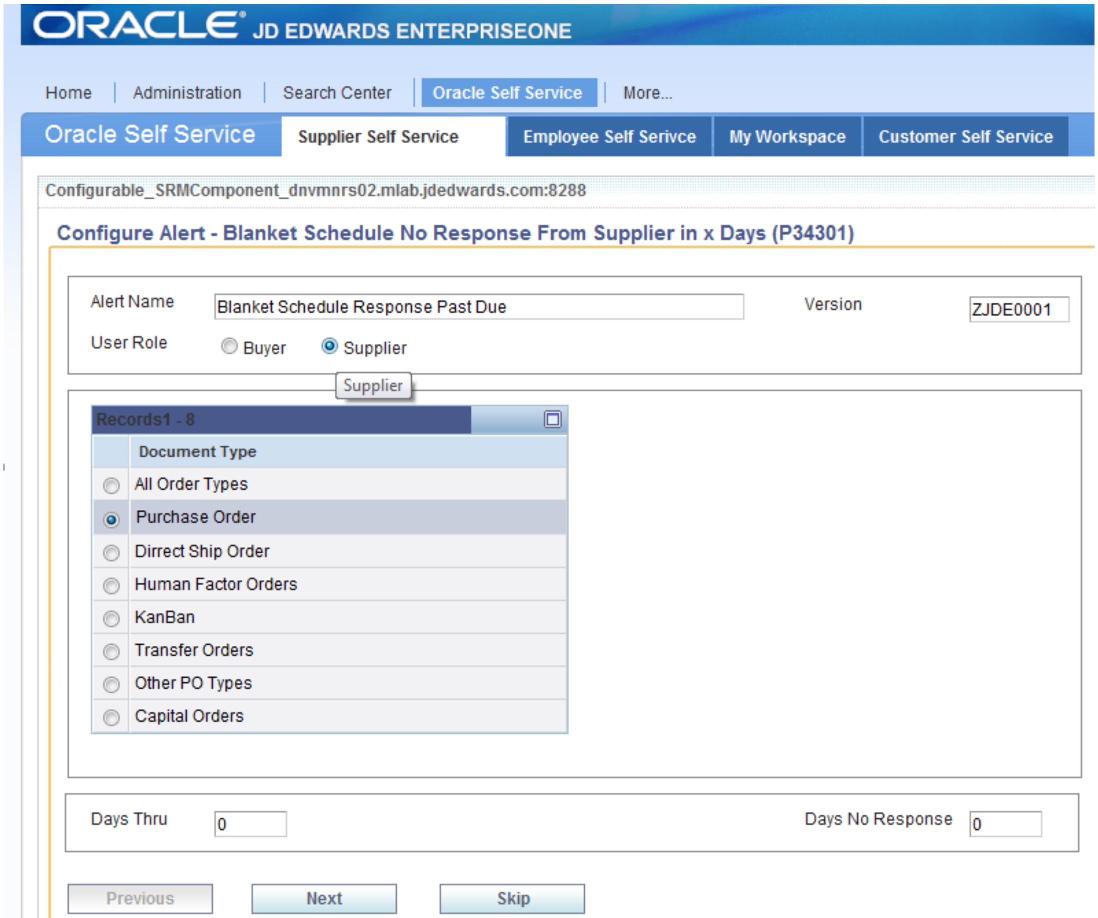


Figure 9–29   Inventory Advanced Search

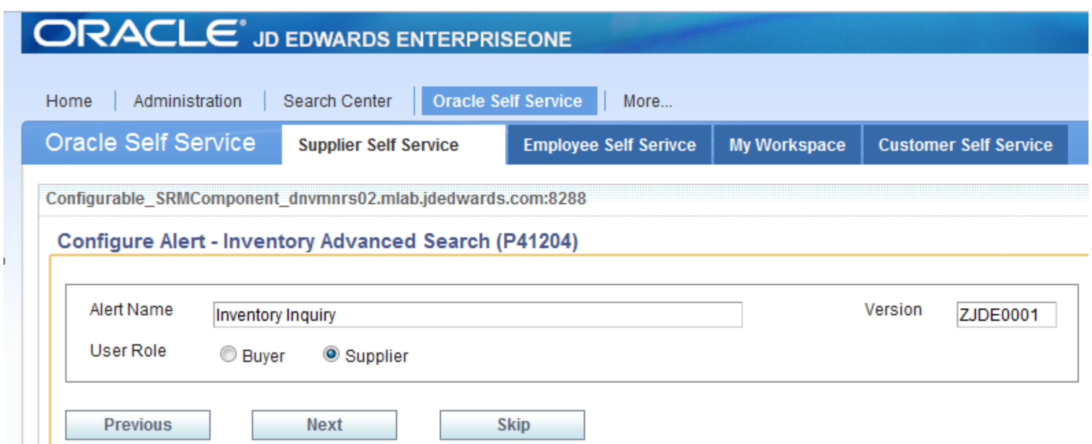


Figure 9–30 Search for Receipt Lines Alert

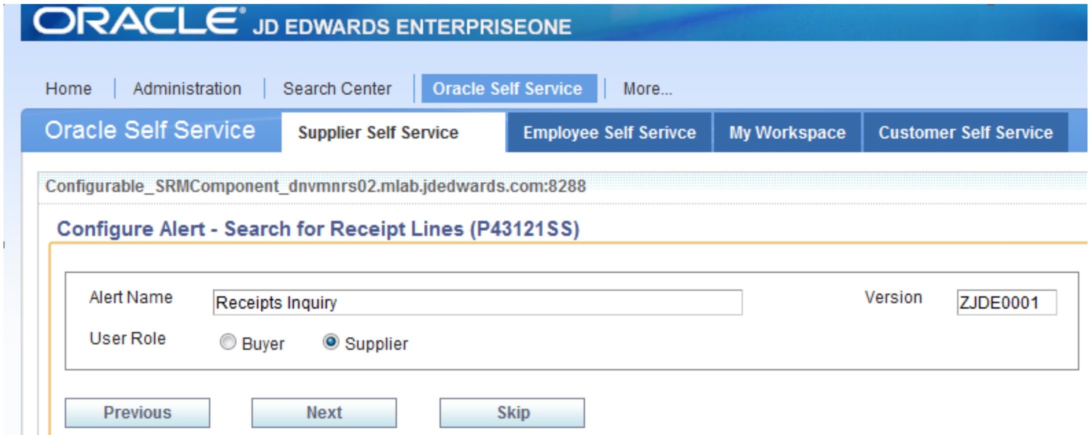
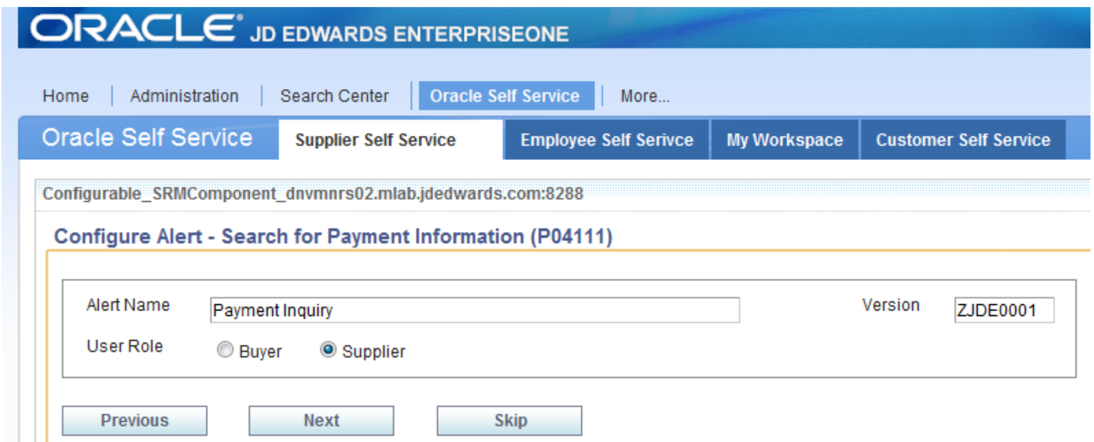
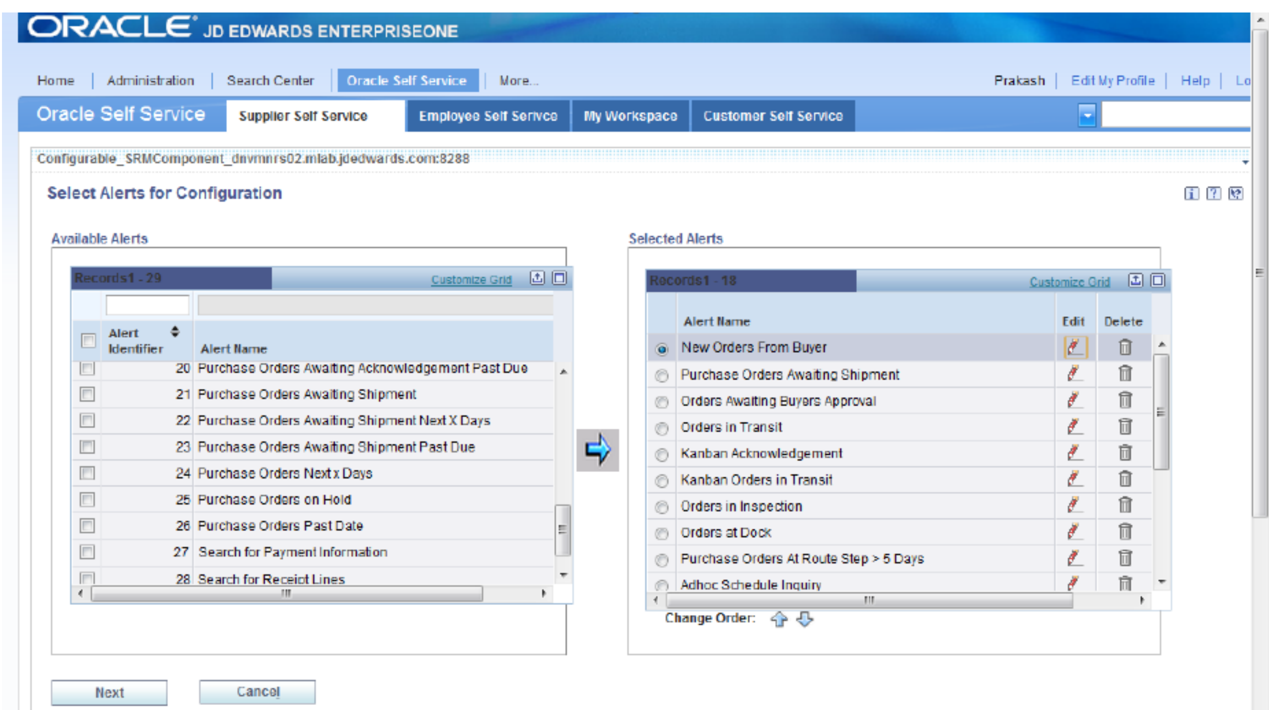
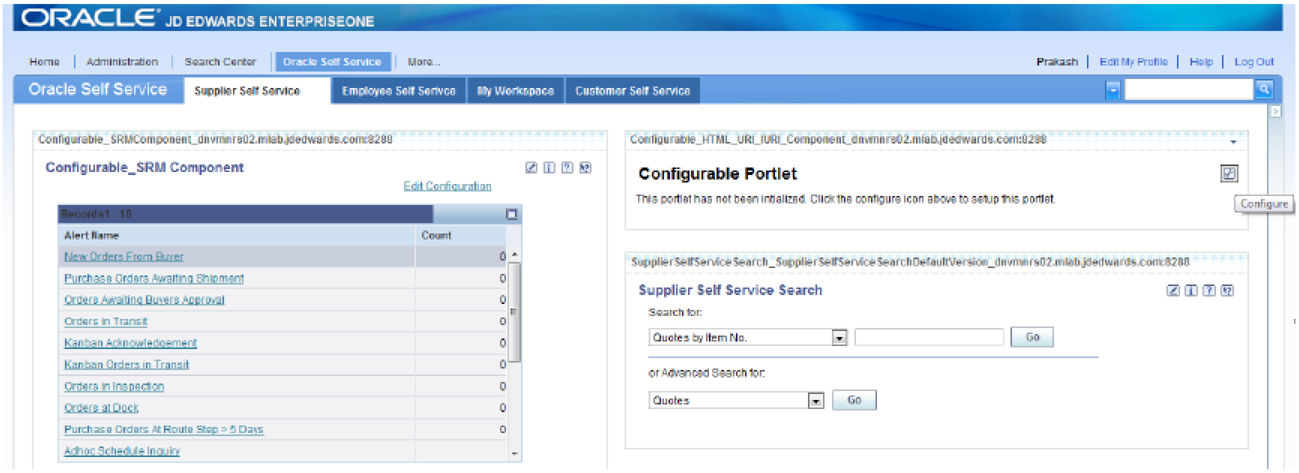


Figure 9–31 Search for Payment Information Alert

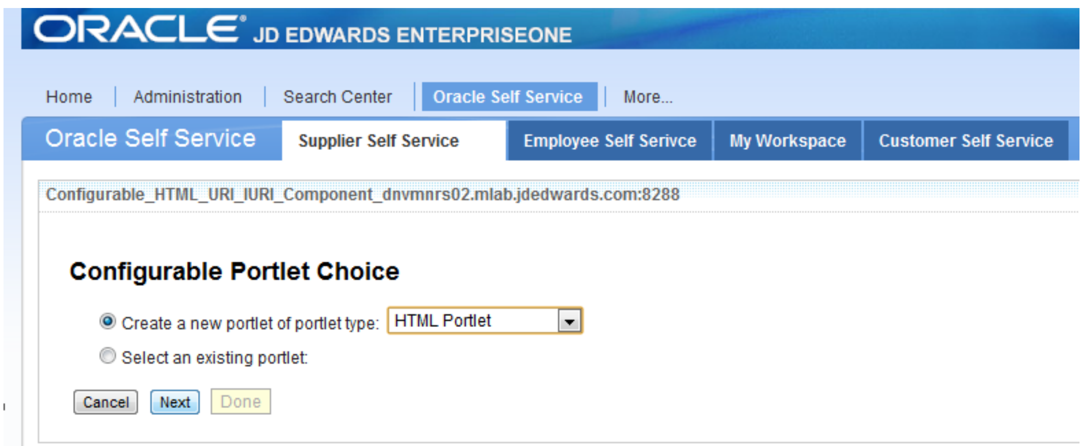




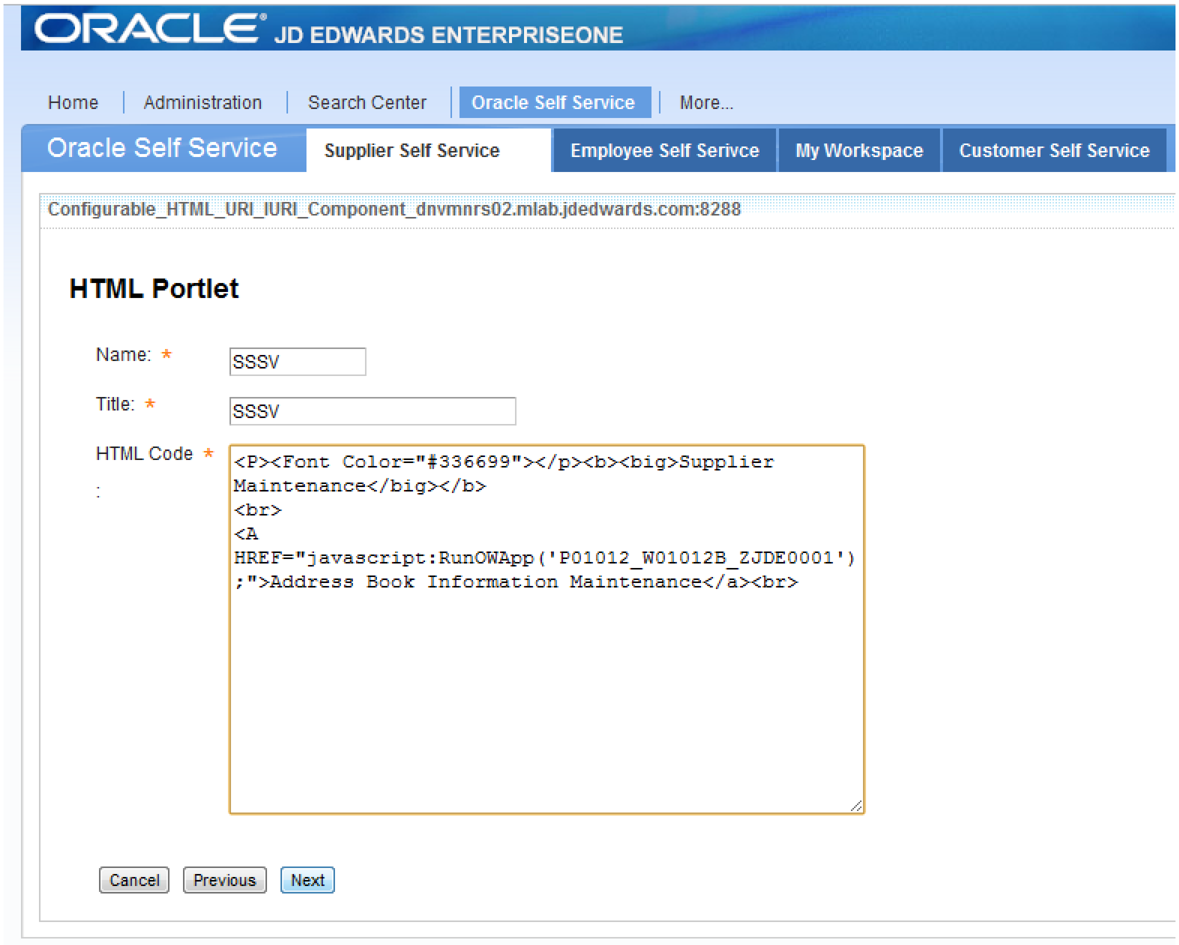
18. Click the “Cancel” button provided to exit the configuration screen.



19. Click the “Configure” Icon on the configurable portlet.

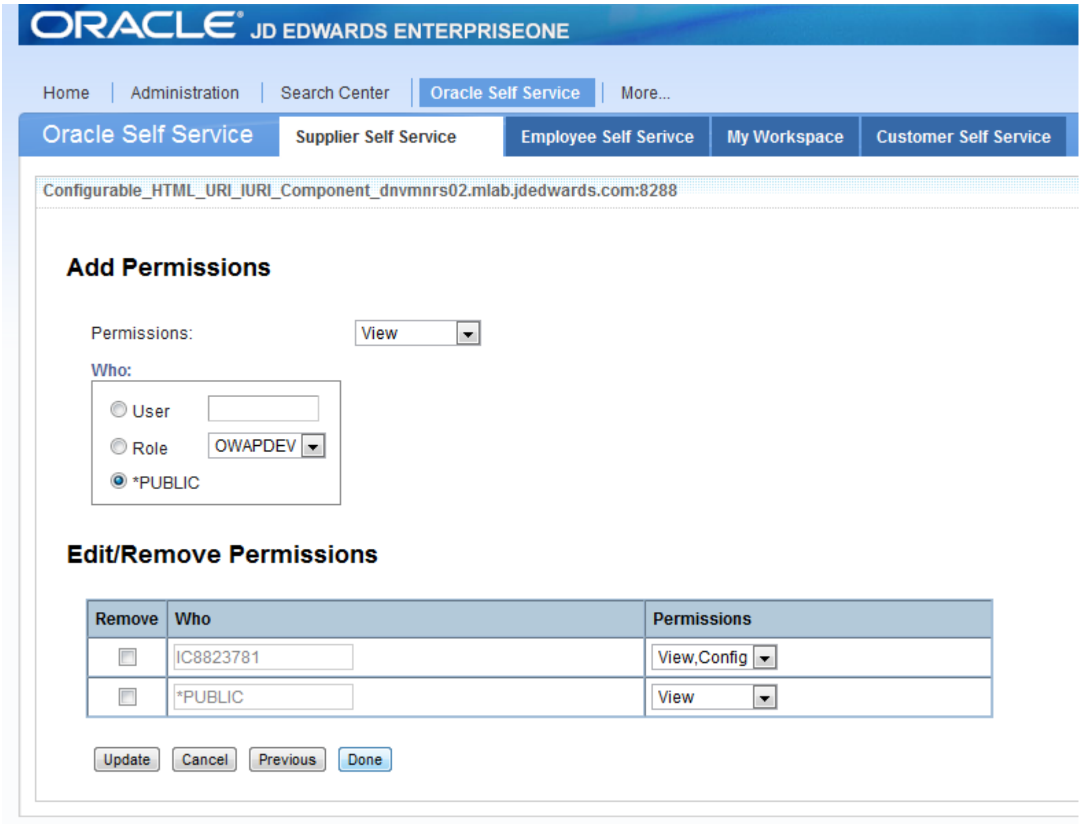


20. Select HTML Portlet from the available list and click “Next”.



21. Enter the Name as “SSSV” and Title as “SSSV” and paste following text in “HTML Code” text area and click “NEXT” button.

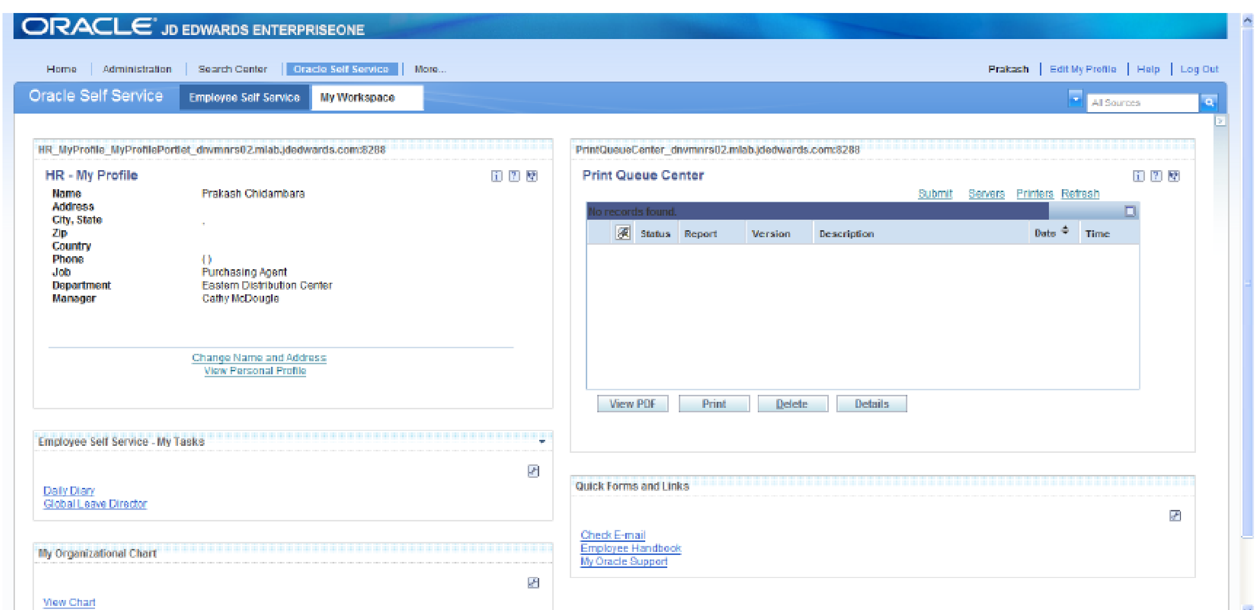
```
<P><Font Color="#336699"></p><b><big>Supplier Maintenance</big></b>
<br>
<A HREF="javascript:RunOWApp('P01012_W01012B_ZJDE0001');">Address Book
Information Maintenance</a><br>
```



22. Set the required permissions and click “Done”.

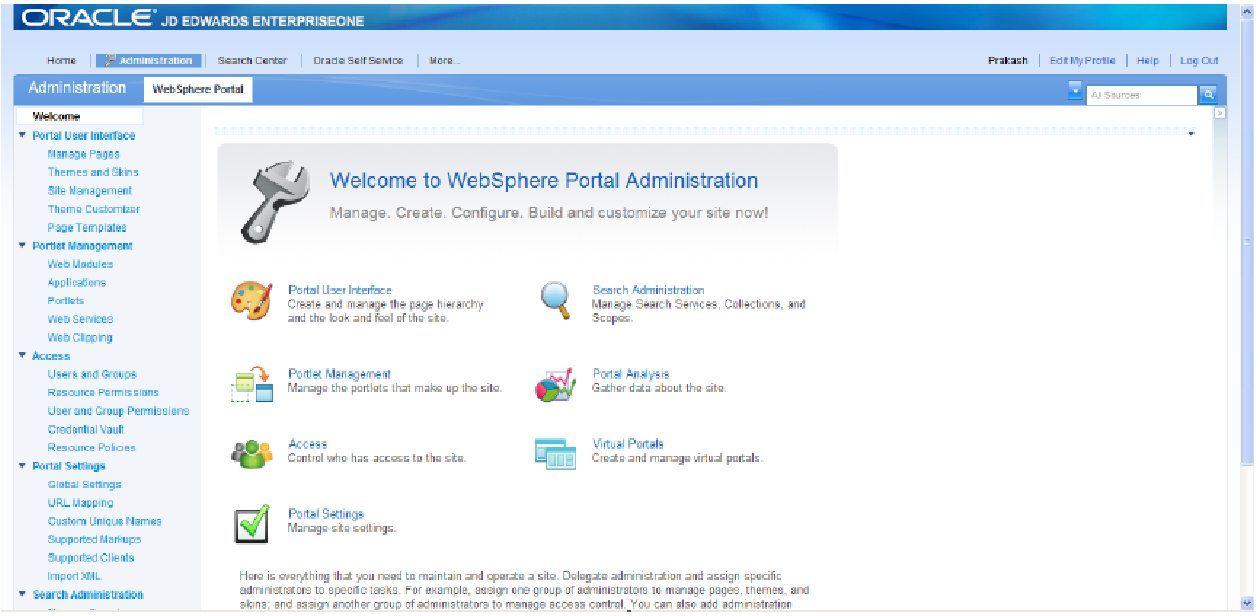
9.6 Creating a My Workspace Portal Page

In this section we will build a My Workspace portal page. The sample My Workspace portal page layout has portlets arranged in two columns. The page has two EnterpriseOne FDA portlets and three Configurable HTML portlets.

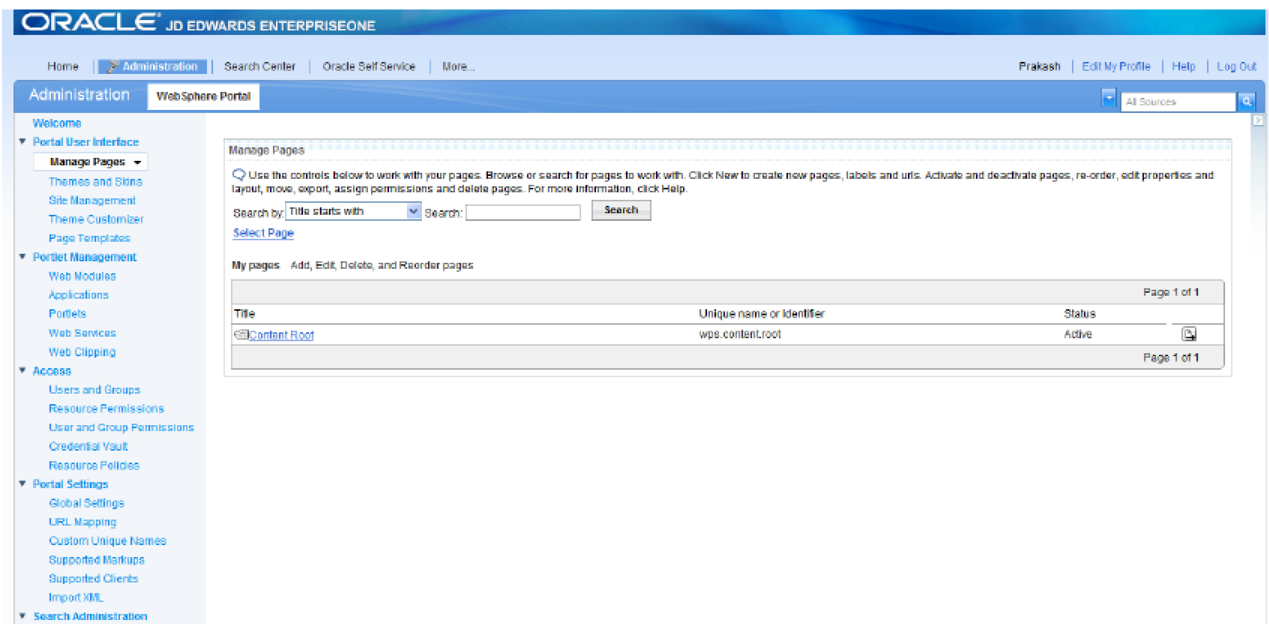


To add the "My Workspace" portal page to Oracle Self Service follow these steps:

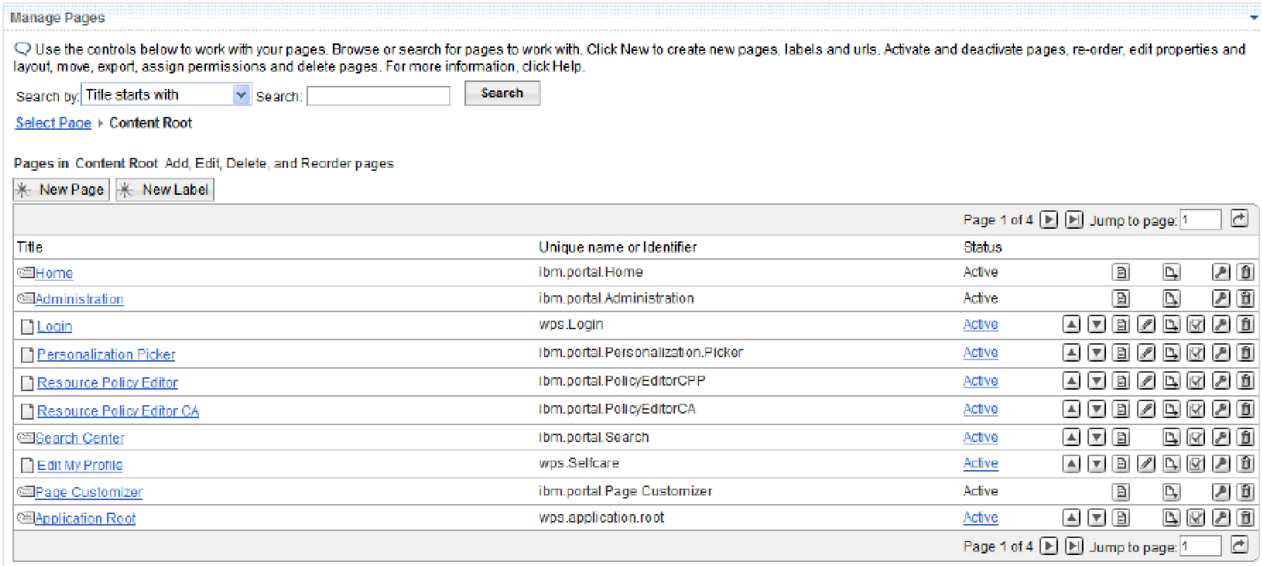
1. Choose "Administration".



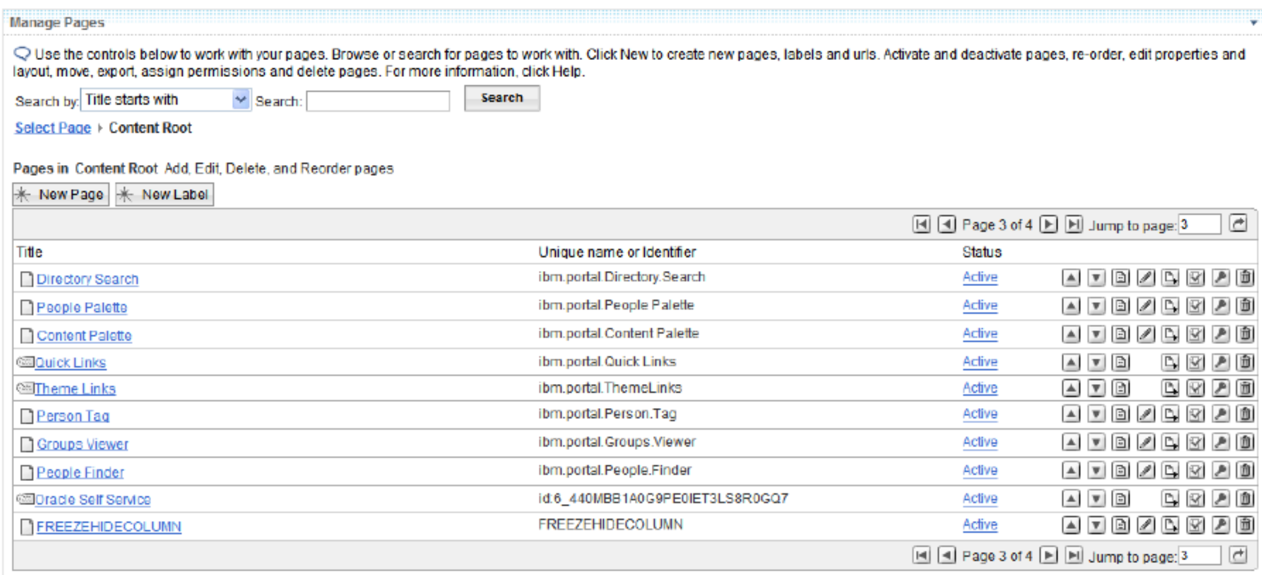
2. On the left pane choose "Manage Pages" under "Portal User Interface".



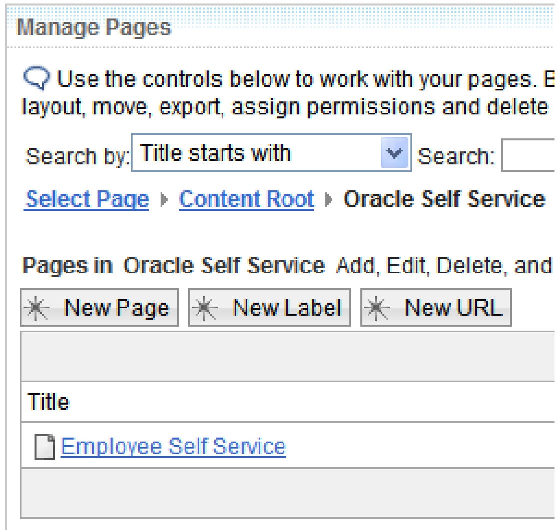
3. Click on "Content Root" link.



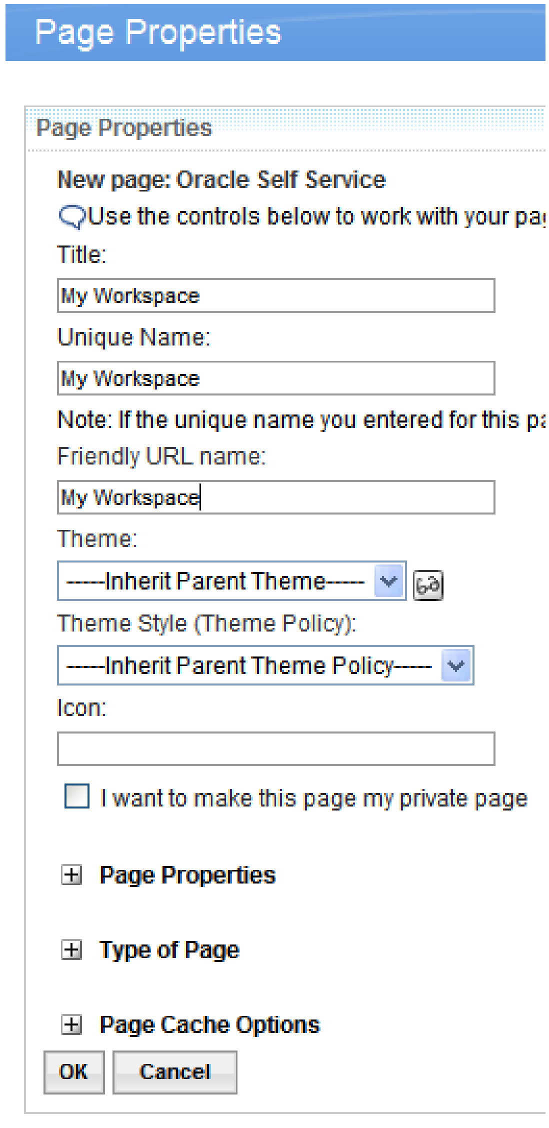
4. Look for the "Oracle Self Service" label created already.



5. Click on the "Oracle Self Service" link.

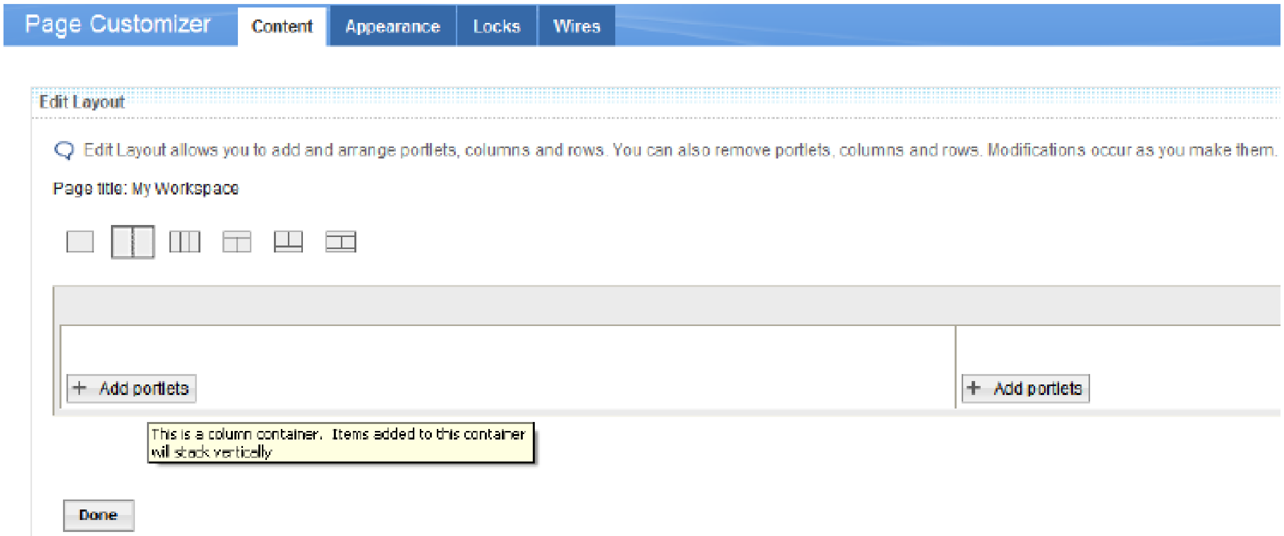


6. Click the "New Page" button.

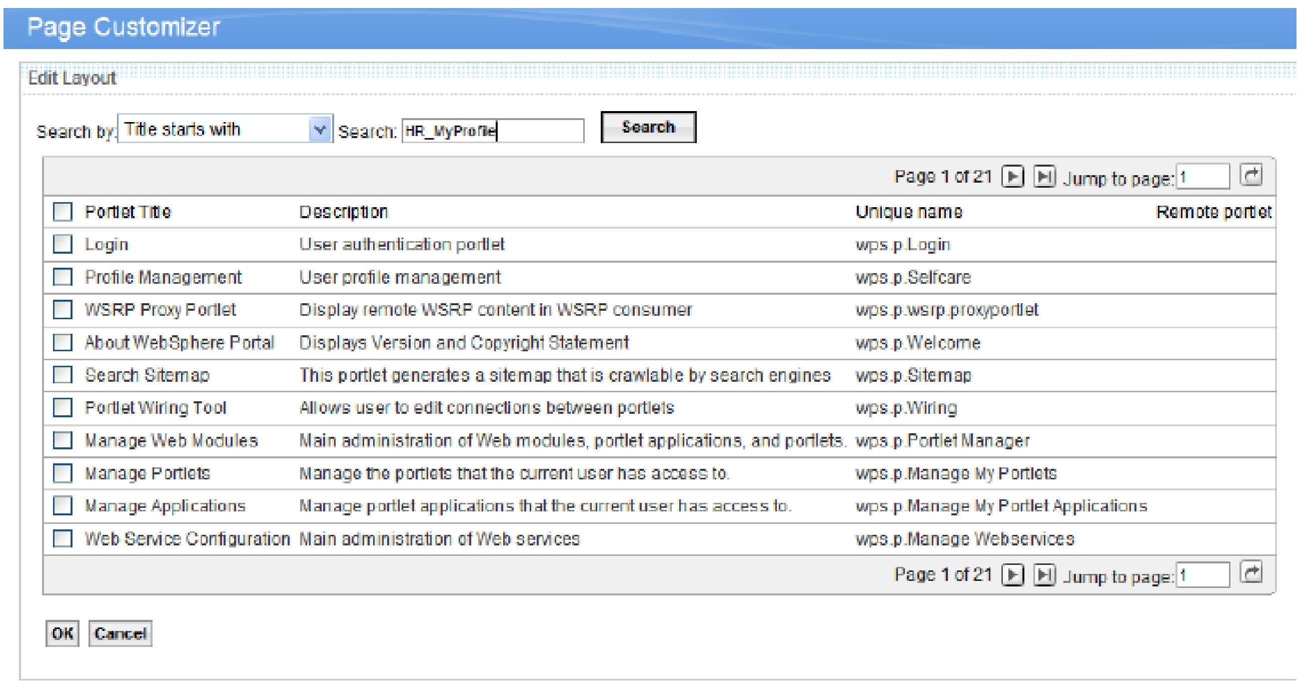


7. Enter Title, Unique Name and Friendly URL name as "My Workspace". Take the default settings for the theme and the Theme Style. Click "OK".

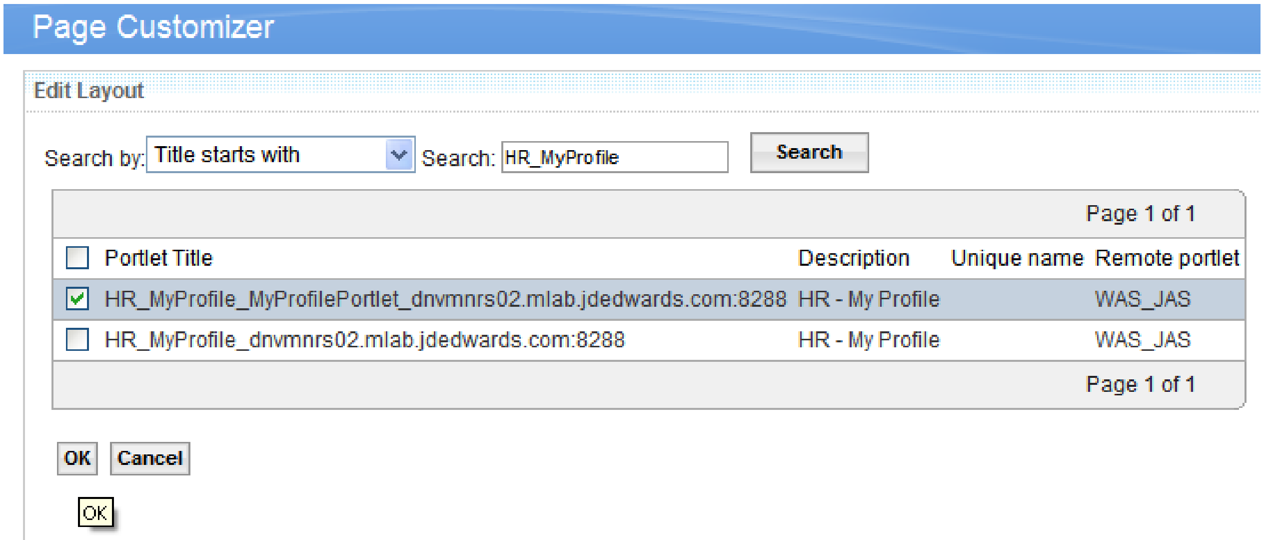
8. To add portlets to My Workspace page, click "Edit Page Layout" button.



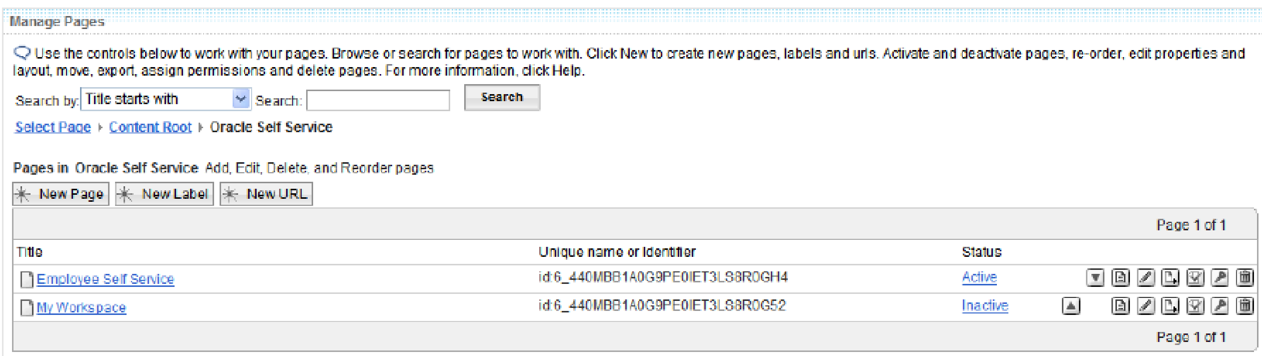
9. To add portlets to the left pane click the "Add portlets" button.



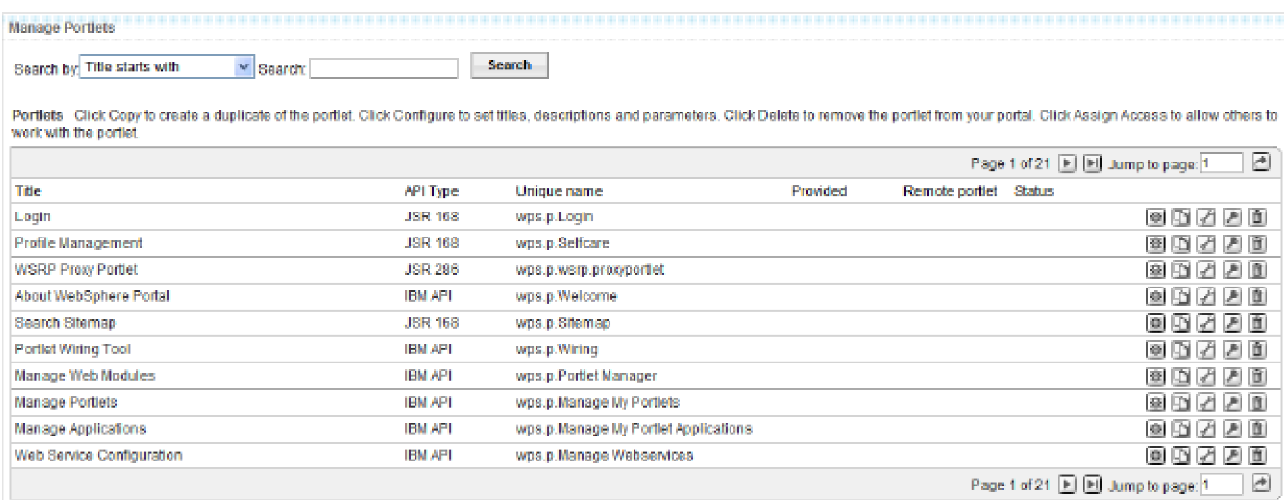
10. To add HR_MyProfile, search for HR_MyProfile.



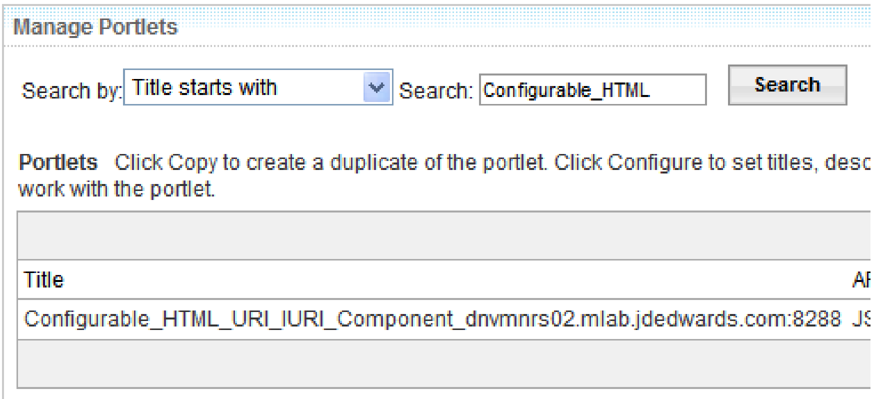
11. Select the required "HR_MyProfile" portlet from the list and click "OK".



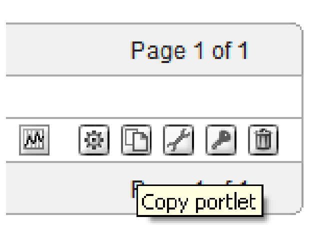
12. "My Workspace" portal page has three "Configurable HTML" portlets. Each portlet has its own header. Follow the steps to create three copies of configurable HTML so that each can have its own header and configuration:



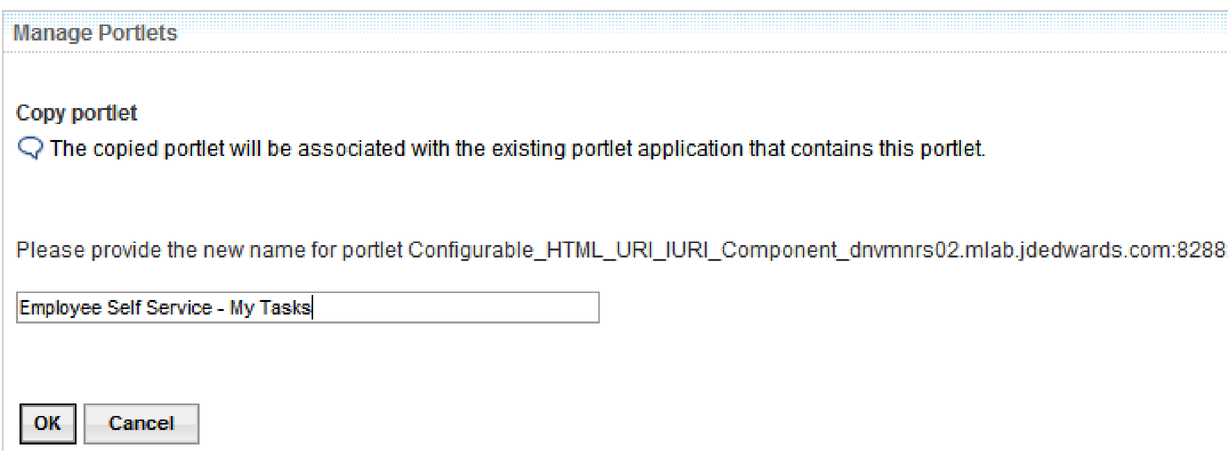
a. On the left pane click "the Portlets" link under "Portlet Management".



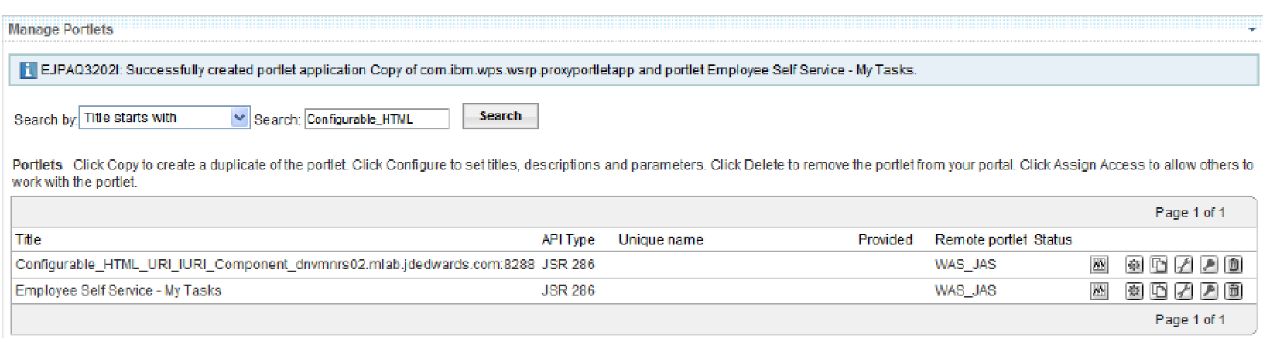
b. Search for "Configurable_HTML_URI_IURI_Component".



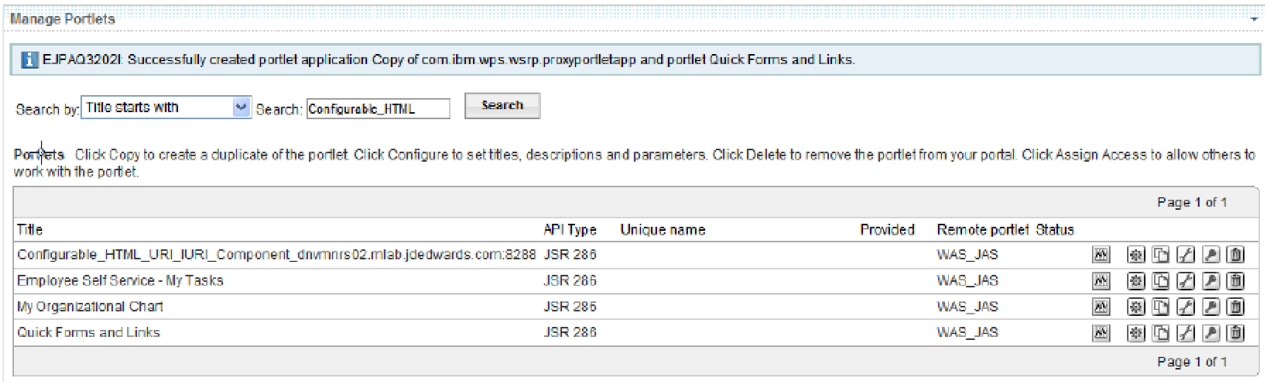
c. Click the "Copy portlet" button of the "Configurable_HTML_URI_IURI_Component" portlet.



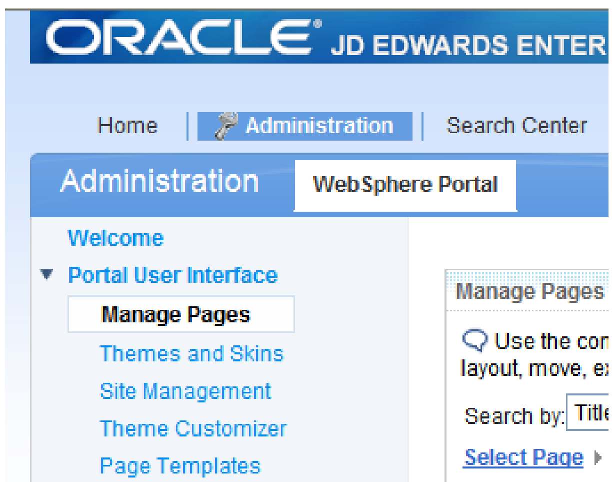
d. Use "Employee Self Service - My Task" as the new name and click "OK".



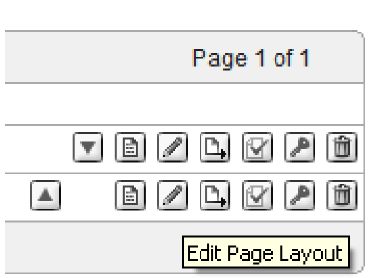
e. Follow steps c and d to create two more copies of "Configurable_HTML_URI_IURI_Component"more portlets named: My Organizational Chart and Quick Forms and Links.



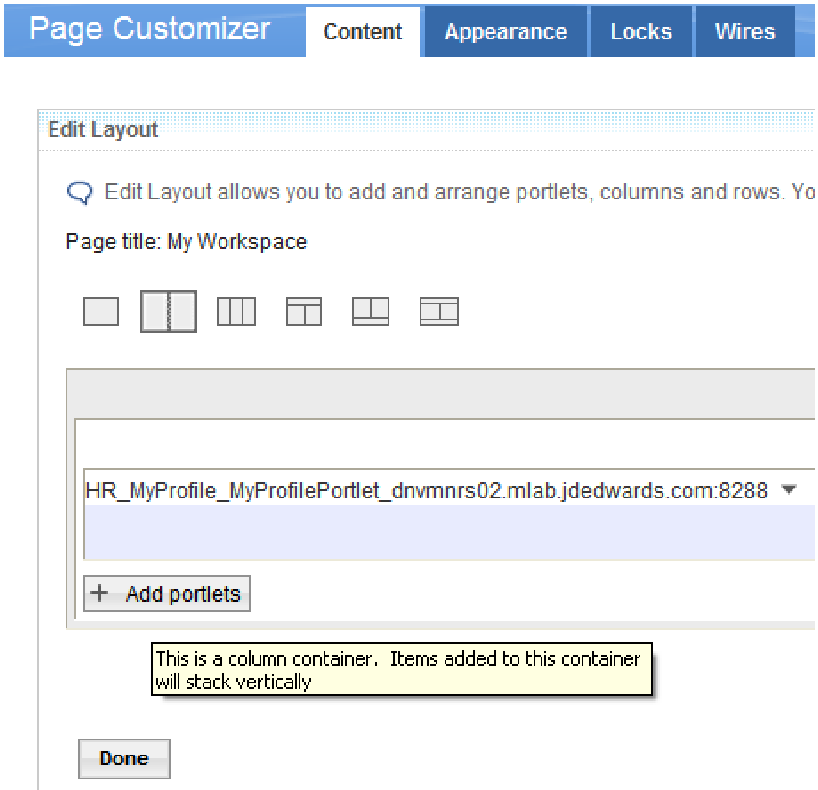
f. This image shows all four available Configurable HTML portlets.



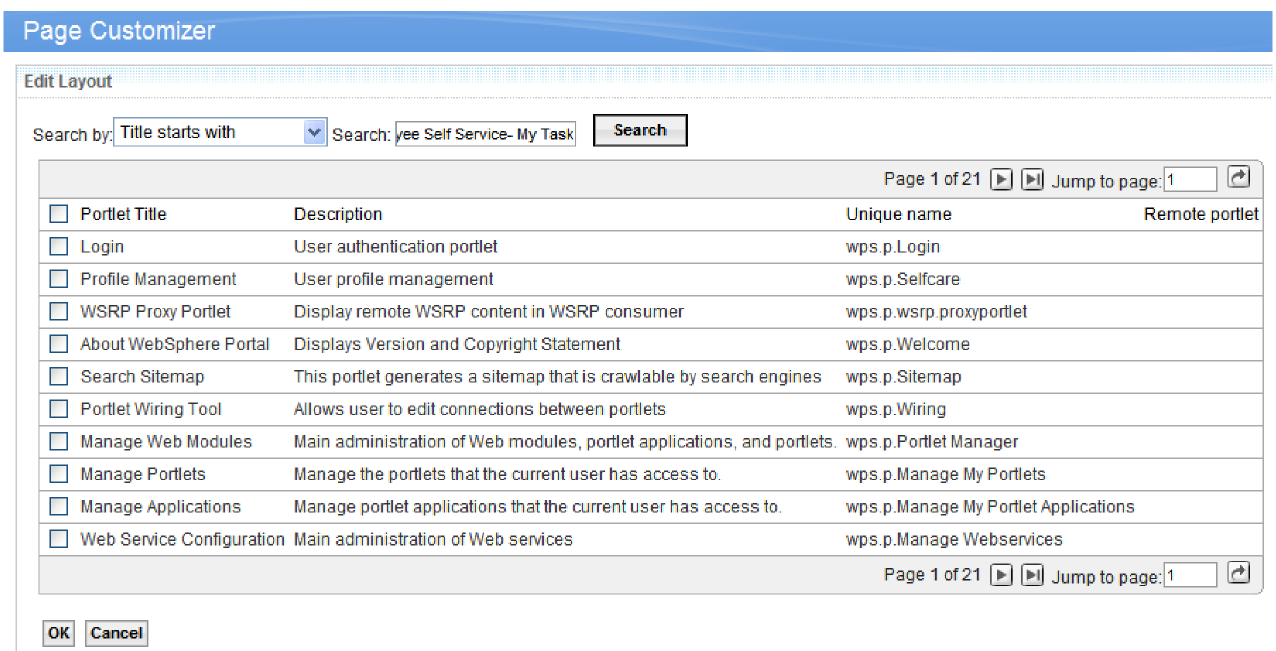
13. To add portlets to the "My Workspace" portal page, choose "Manage Pages" under "Portal User Interface".



14. To add portlets to the "My Workspace" portal page, click the "Edit Page Layout" button.

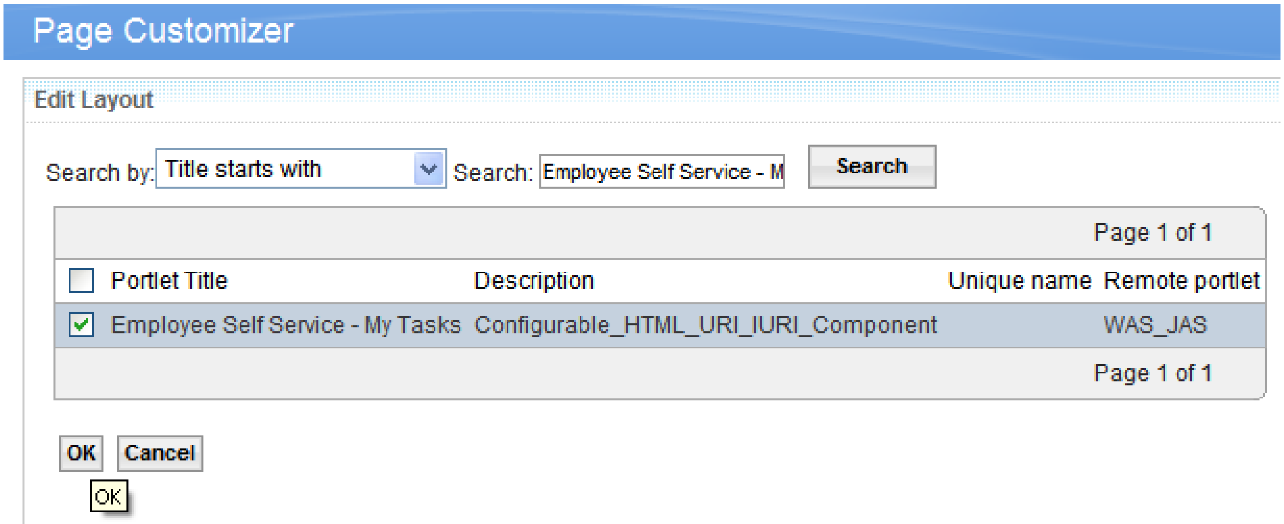


15. To add portlets to the left pane, click the "Add portlets" button.

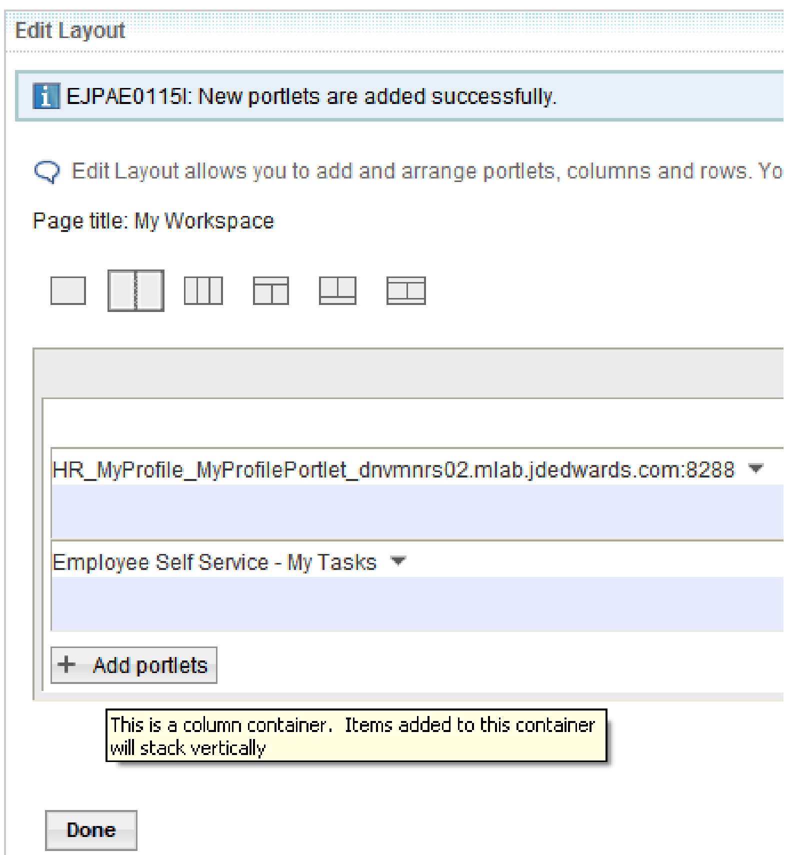


Portlet Title	Description	Unique name	Remote portlet
Login	User authentication portlet	wps.p.Login	
Profile Management	User profile management	wps.p.Selfcare	
WSRP Proxy Portlet	Display remote WSRP content in WSRP consumer	wps.p.wsrp.proxyportlet	
About WebSphere Portal	Displays Version and Copyright Statement	wps.p.Welcome	
Search Sitemap	This portlet generates a sitemap that is crawlable by search engines	wps.p.Sitemap	
Portlet Wiring Tool	Allows user to edit connections between portlets	wps.p.Wiring	
Manage Web Modules	Main administration of Web modules, portlet applications, and portlets.	wps.p.Portlet Manager	
Manage Portlets	Manage the portlets that the current user has access to.	wps.p.Manage My Portlets	
Manage Applications	Manage portlet applications that the current user has access to.	wps.p.Manage My Portlet Applications	
Web Service Configuration	Main administration of Web services	wps.p.Manage Webservices	

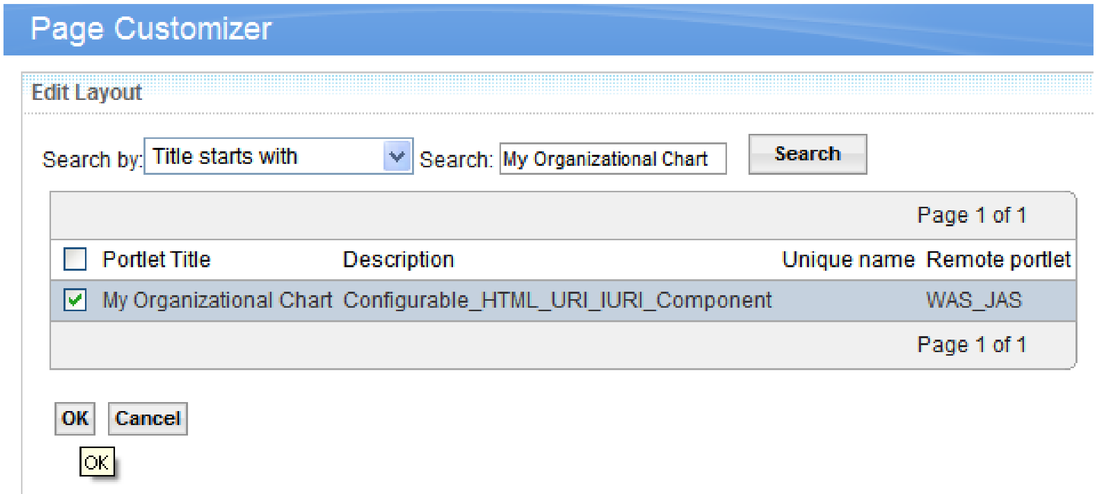
16. To add the "Employee Self Service - My Task" that we created in step 12, search for "Employee Self Service - My Task".



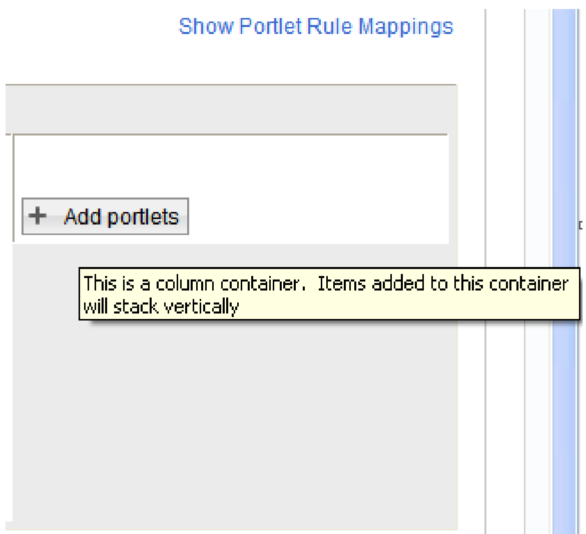
17. Select the "Employee Self Service - My Task" portlet from the list and click "OK".



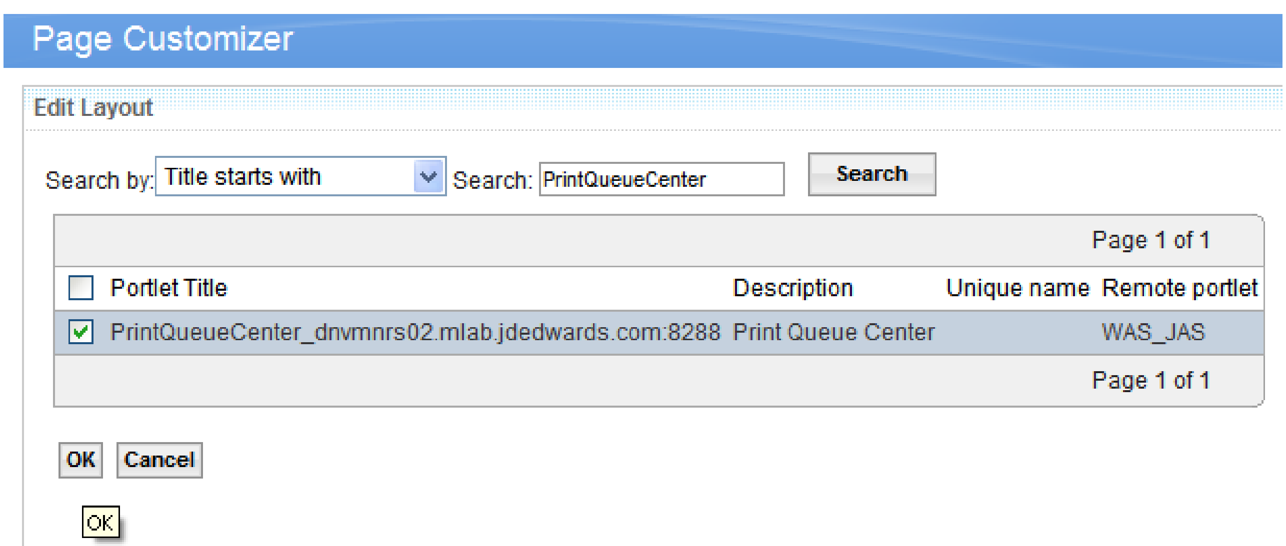
18. To add the "My Organizational Chart" portlet, click the "Add Portlets" button.



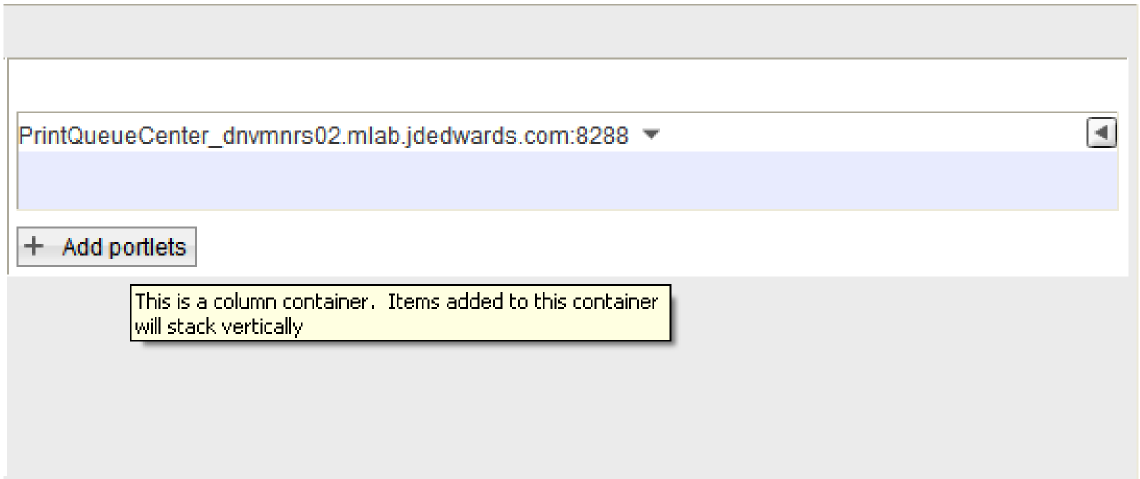
19. Search for "My Organizational Chart", select the required "My Organizational Chart" portlet from the list, and click "OK".



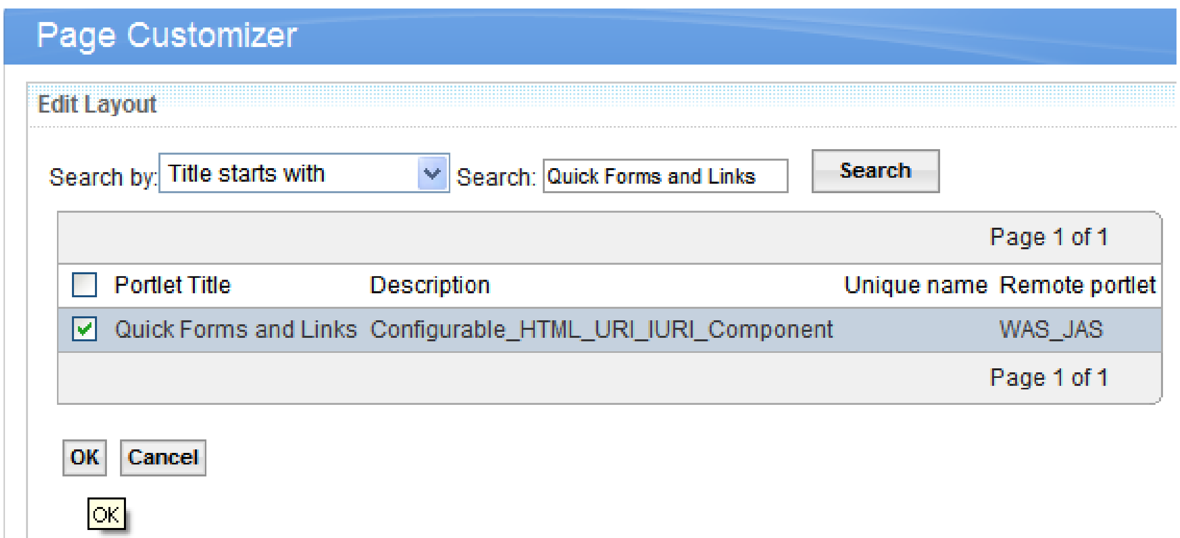
20. To add portlets to right pane, click "Add Portlets" on the right pane.



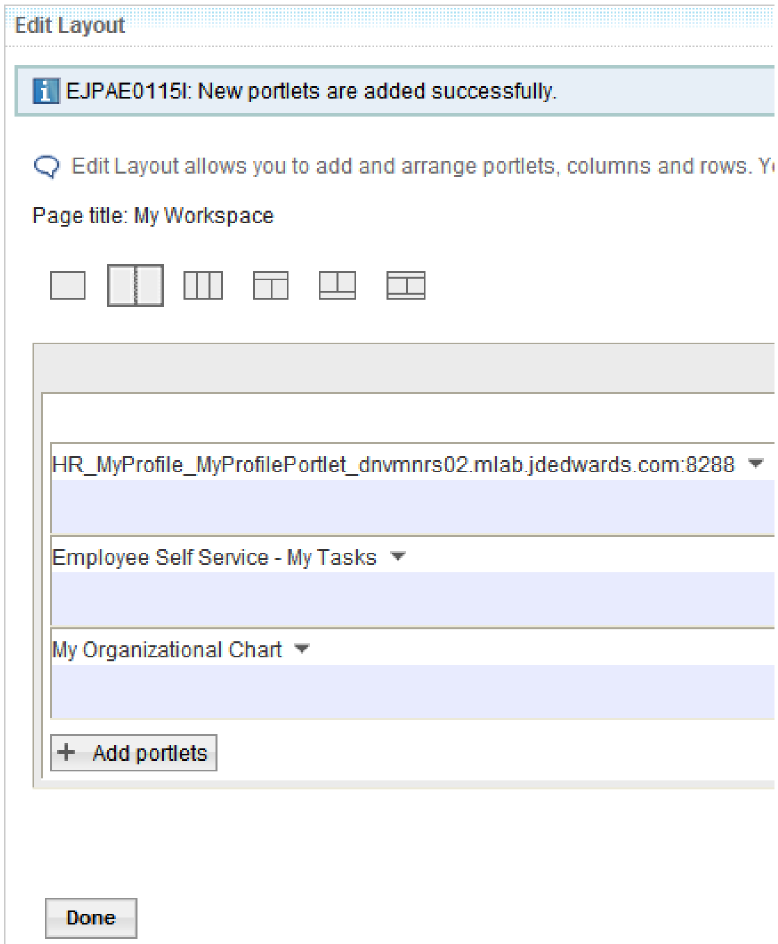
21. Search for "PrintQueueCenter", select the required "PrintQueueCenter" portlet from the list and click "OK".



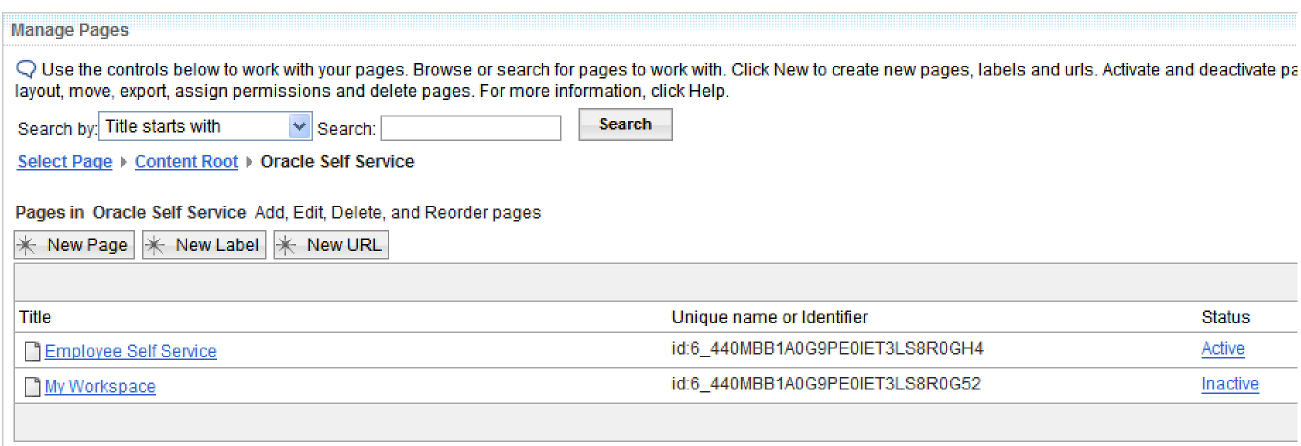
22. To add the "Quick Forms and Links" portlet, click the "Add portlets" button.



23. Search for "Quick Forms and Links", select the required "Quick Forms and Links" portlet from the list, and click "OK".

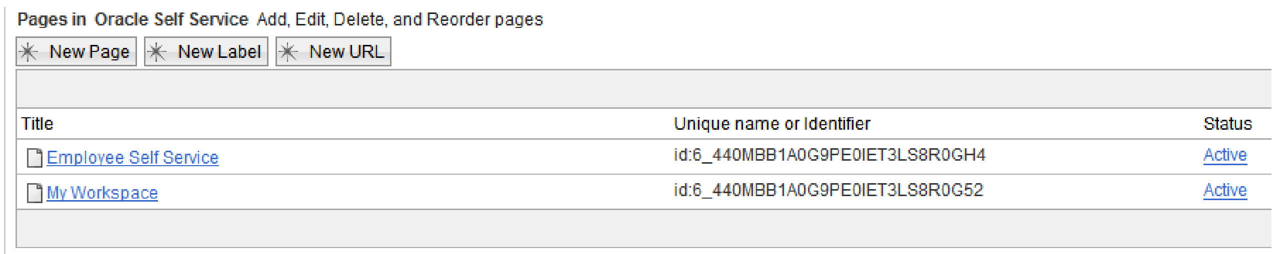


24. Click "Done".

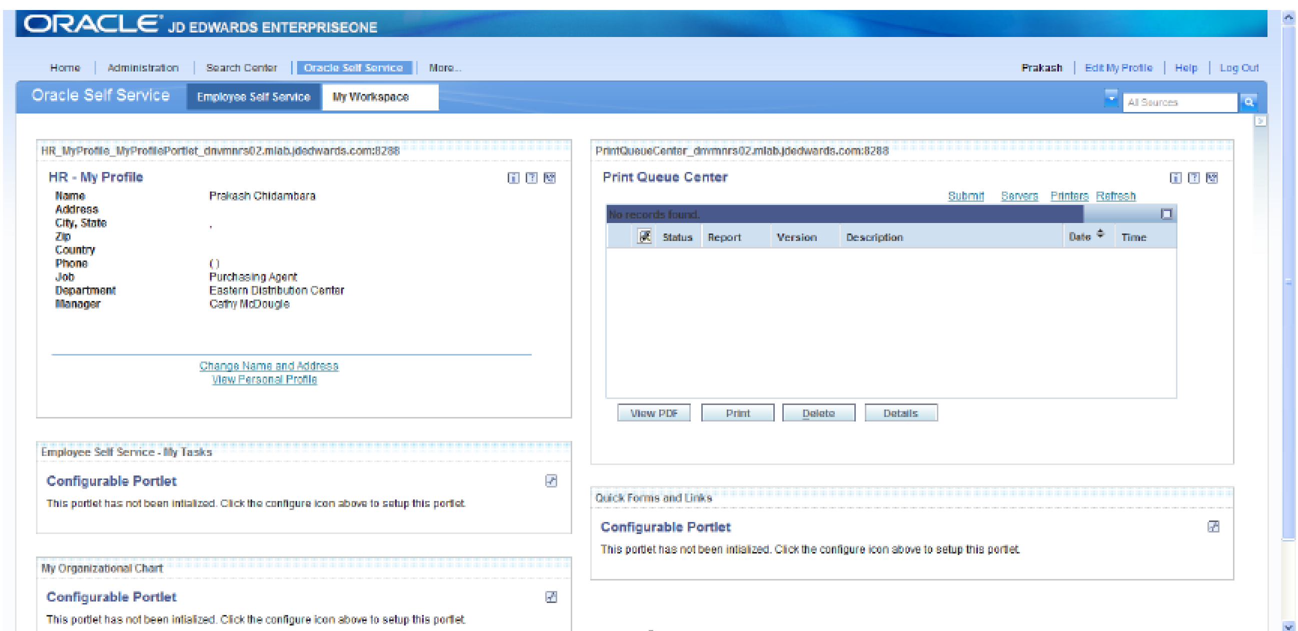


25. The status of the portal page should be active for the portal page to be available to the user. If any of the portal pages are inactive, then activate the portal page by clicking on the "inactive" link. In this image, "My Workspace" is inactive. Activate by clicking on the "inactive" link.

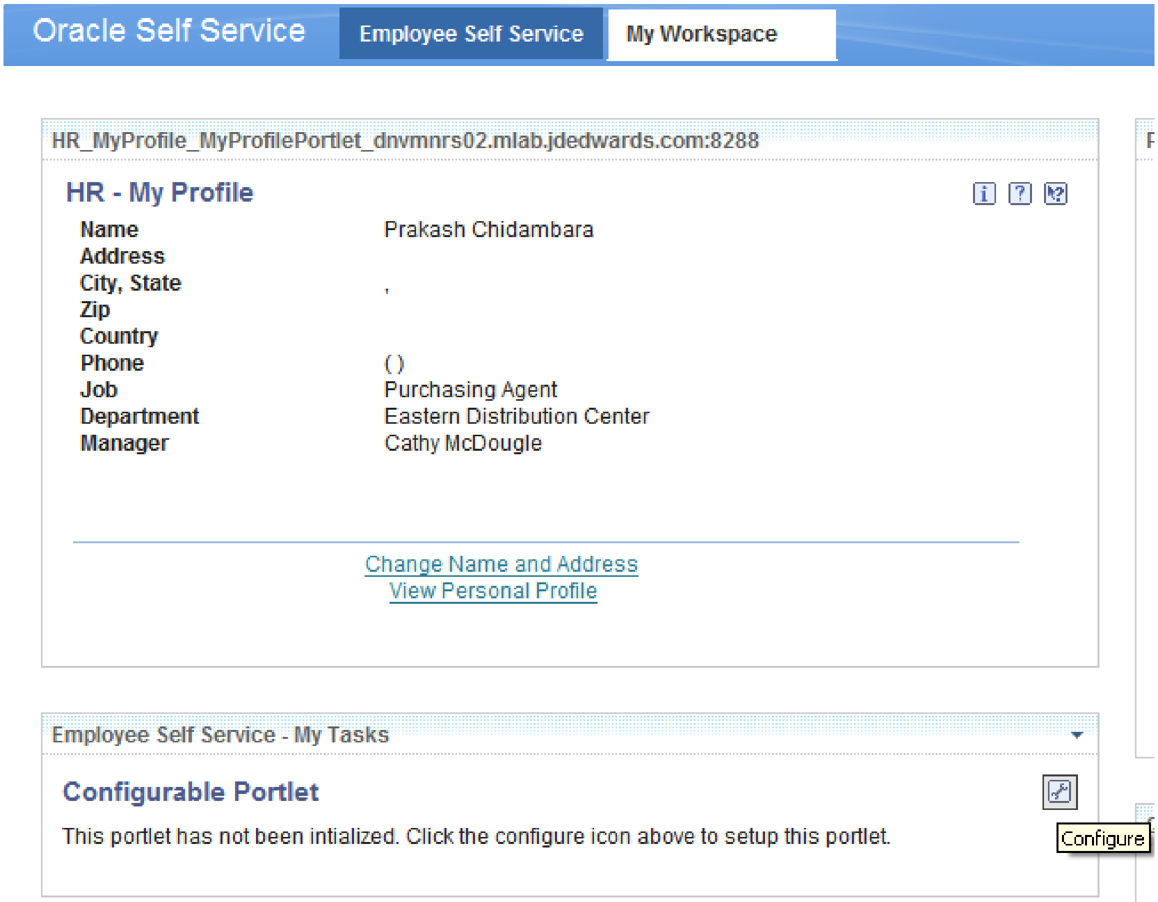
26. Click "OK".



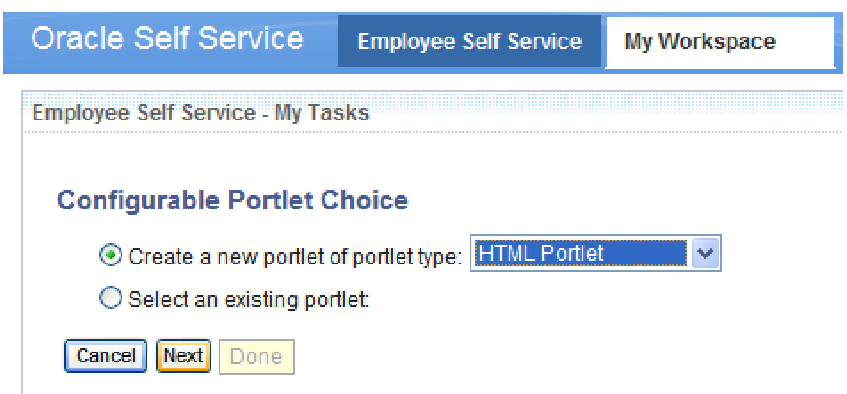
27. Make sure that "My Workspace" is active.



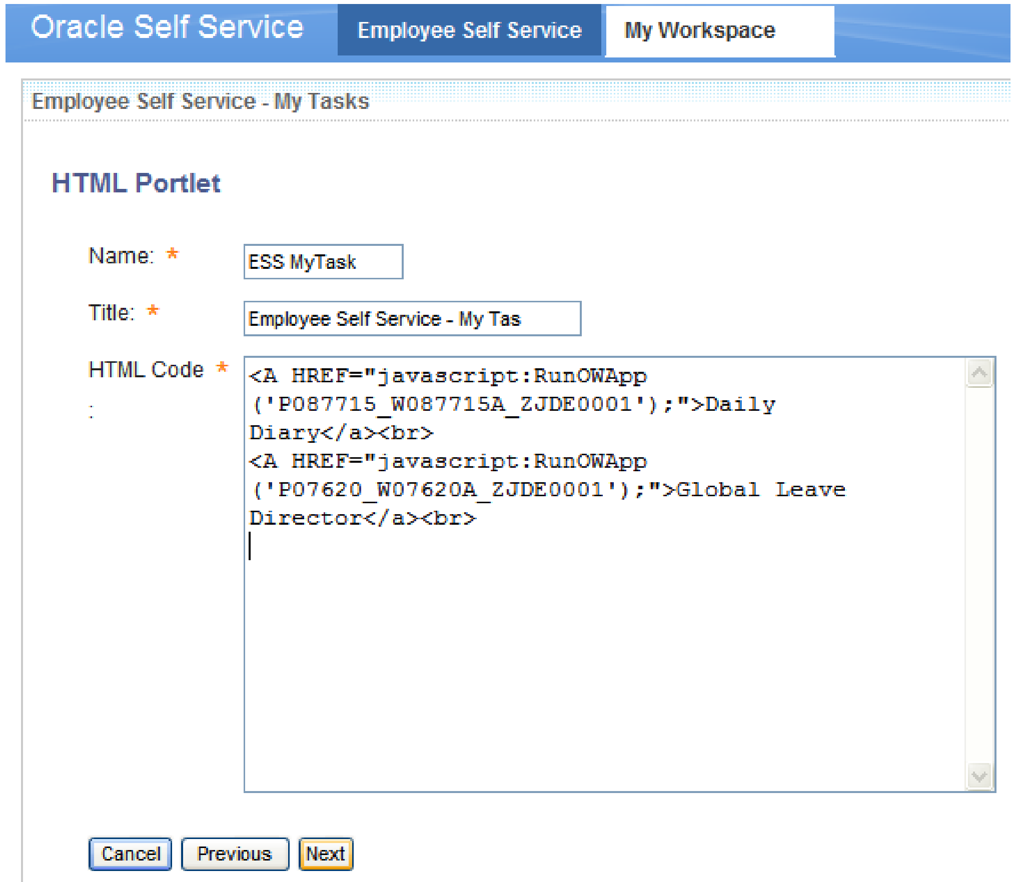
28. To view the "My Workspace" portal page created, select Oracle Self Service, My Workspace.



29. To configure the "Employee Self Service - My Tasks" portlet, click the Configure icon on the portlet.

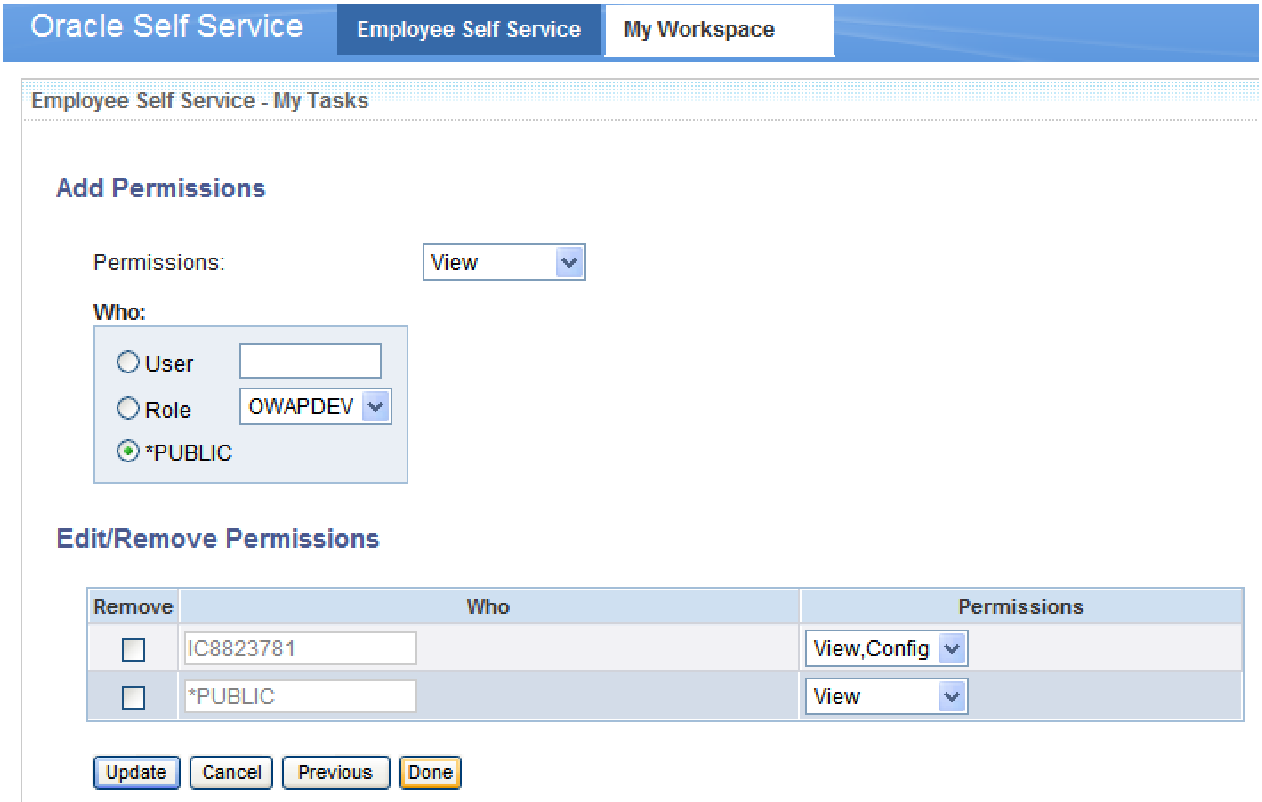


30. Make sure that the "Create a new portlet of portlet type" radio button is selected and then select "HTML Portlet" from the list.

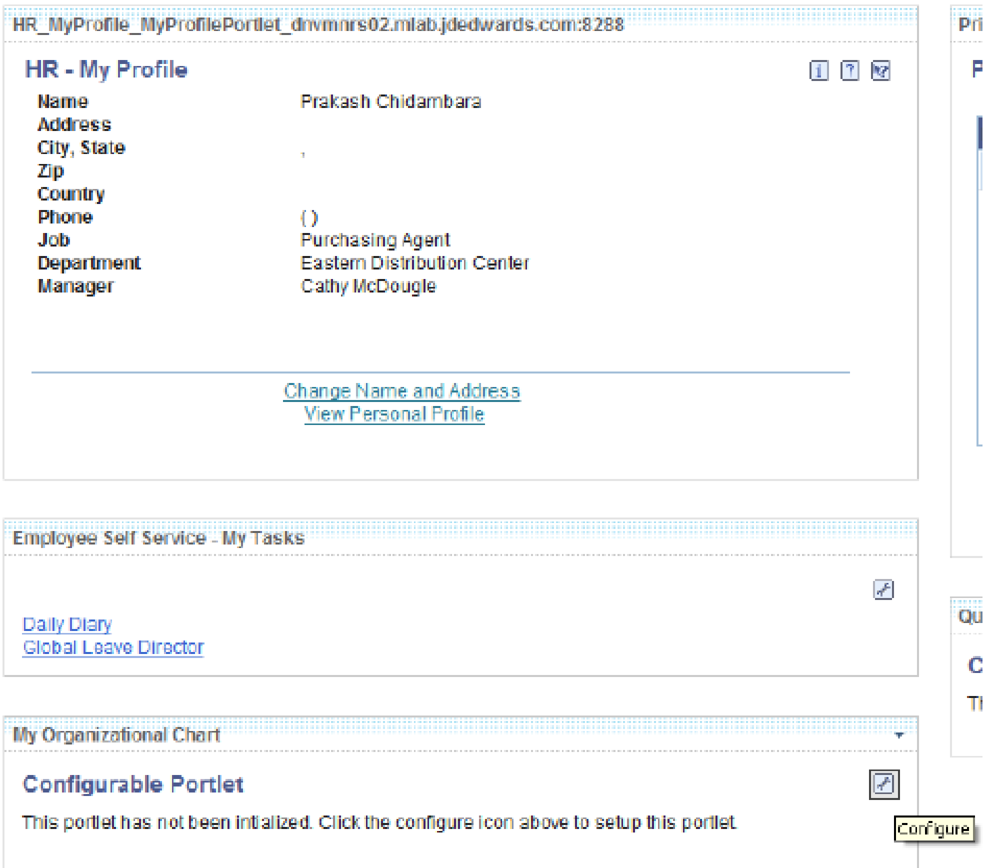


31. Enter the Name as "ESS MyTask" and Title as "Employee Self Service - My Task" and paste following text in the "HTML Code" text area and click next.

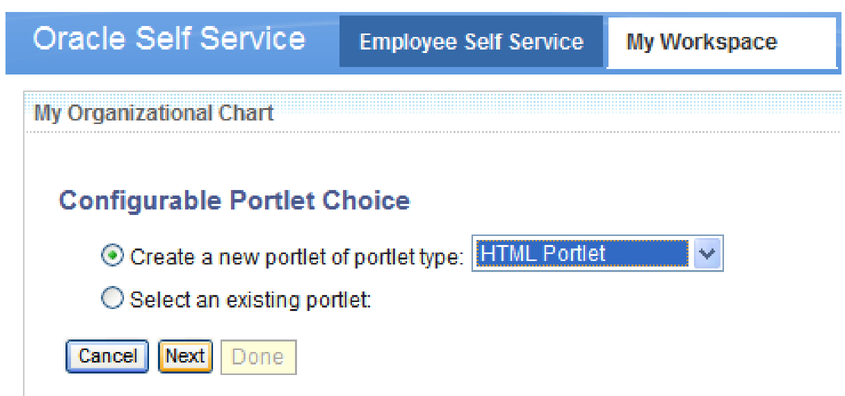
```
<A HREF="javascript:RunOWApp('P087715_W087715A_ZJDE0001');">Daily Diary</a><br>
<A HREF="javascript:RunOWApp('P07620_W07620A_ZJDE0001');">Global Leave
Director</a><br>
```



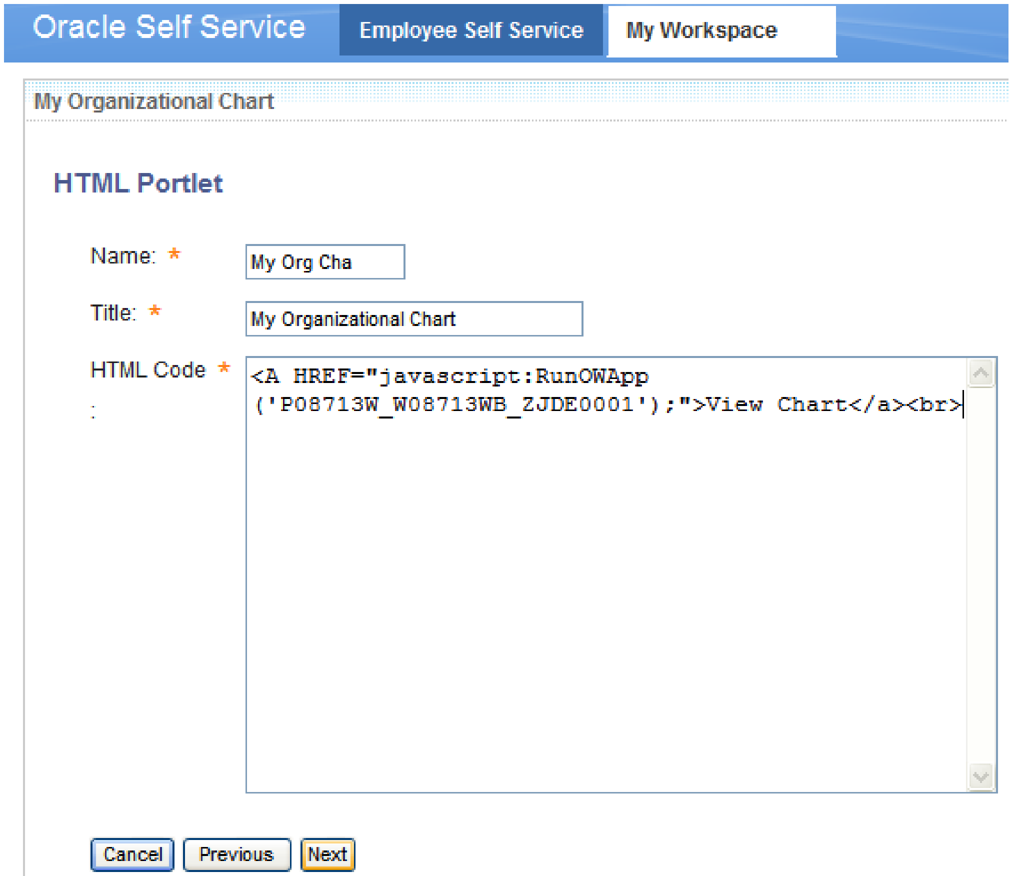
32. Set required permissions and click "Done".



33. To configure the "My Organizational Chart" portlet, click the Configure icon on the portlet.

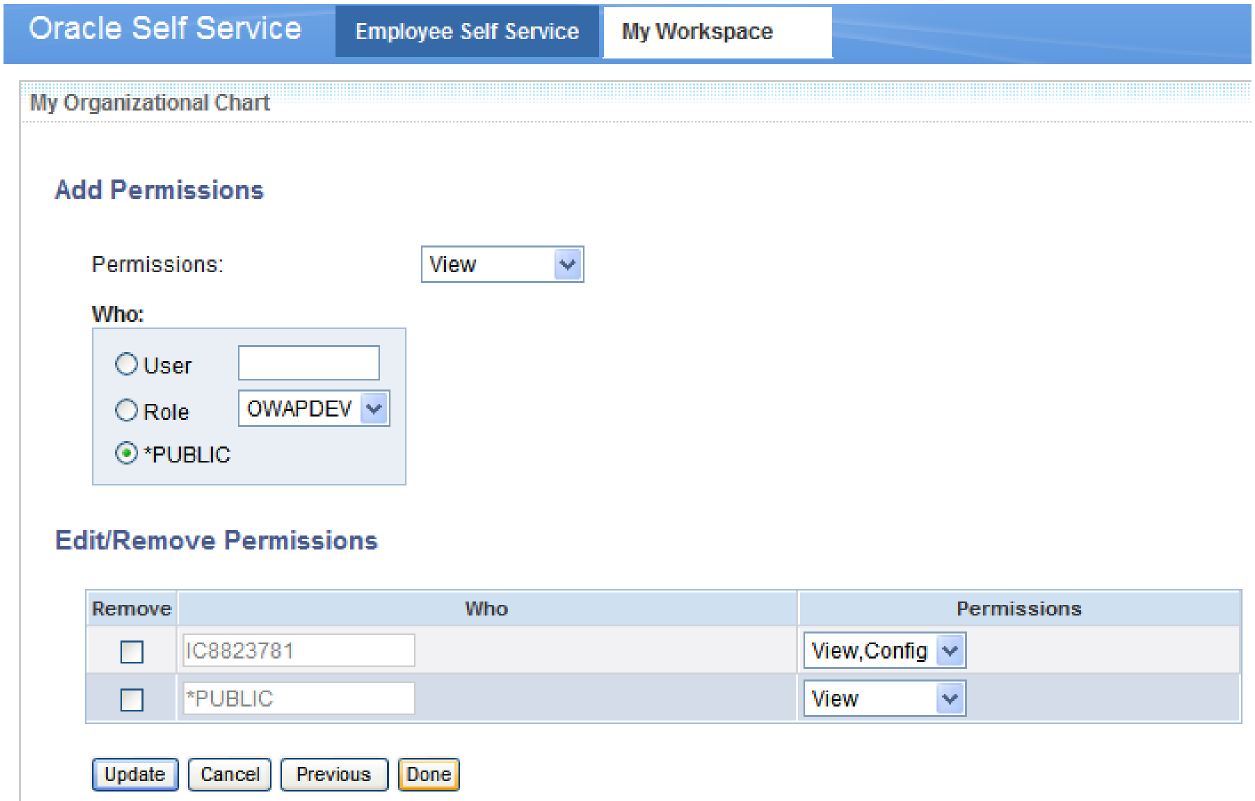


34. Make sure that the "Create a new portlet of portlet type" radio button is selected and then select "HTML Portlet" from the list.

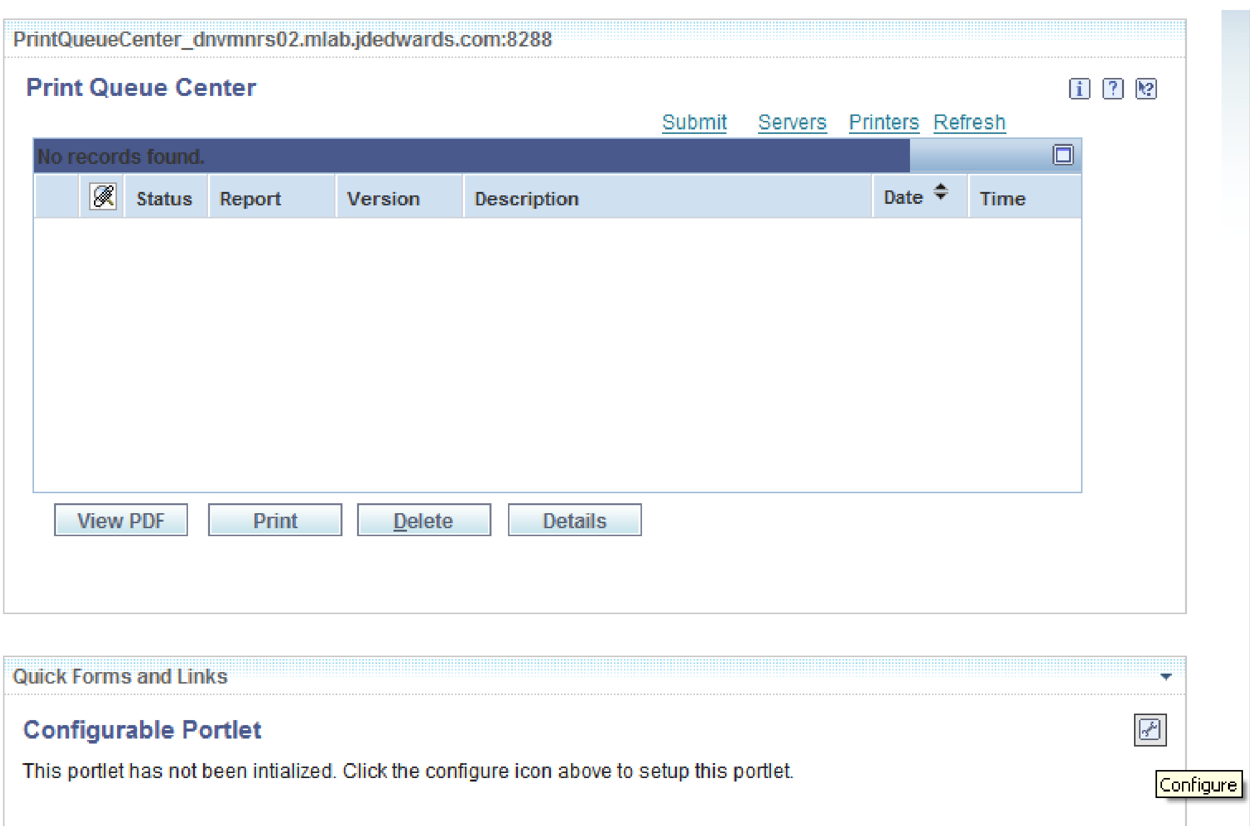


35. Enter the Name as "My Org Chart" and Title as "My Organizational Chart" and paste following text in "HTML Code" text area and click next.

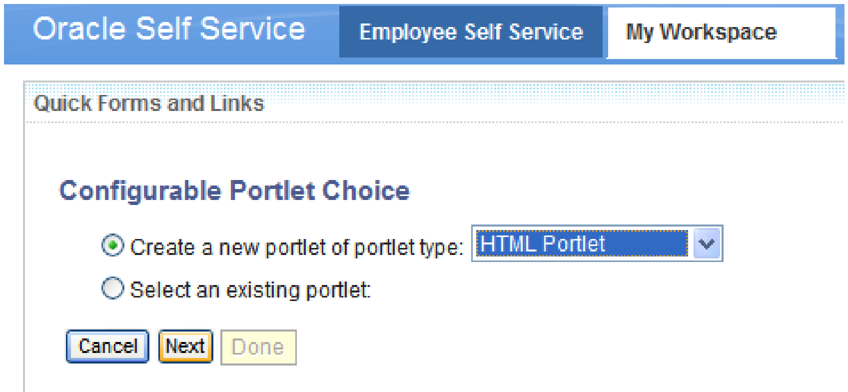
```
<A HREF="javascript:RunOWApp('P08713W_W08713WB_ZJDE0001');">View Chart</a><br>
```



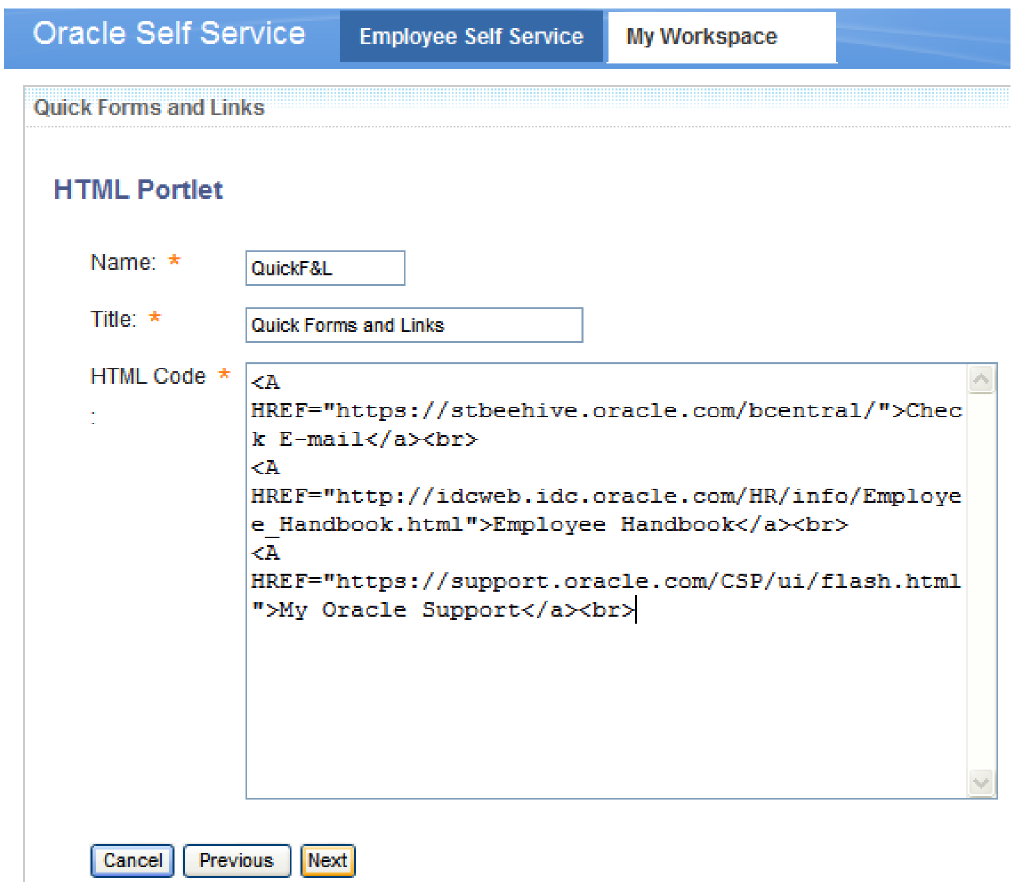
36. Set required permissions and click "Done".



37. To configure the "Employee Self Service - My Tasks" portlet, click the Configure icon on the portlet.

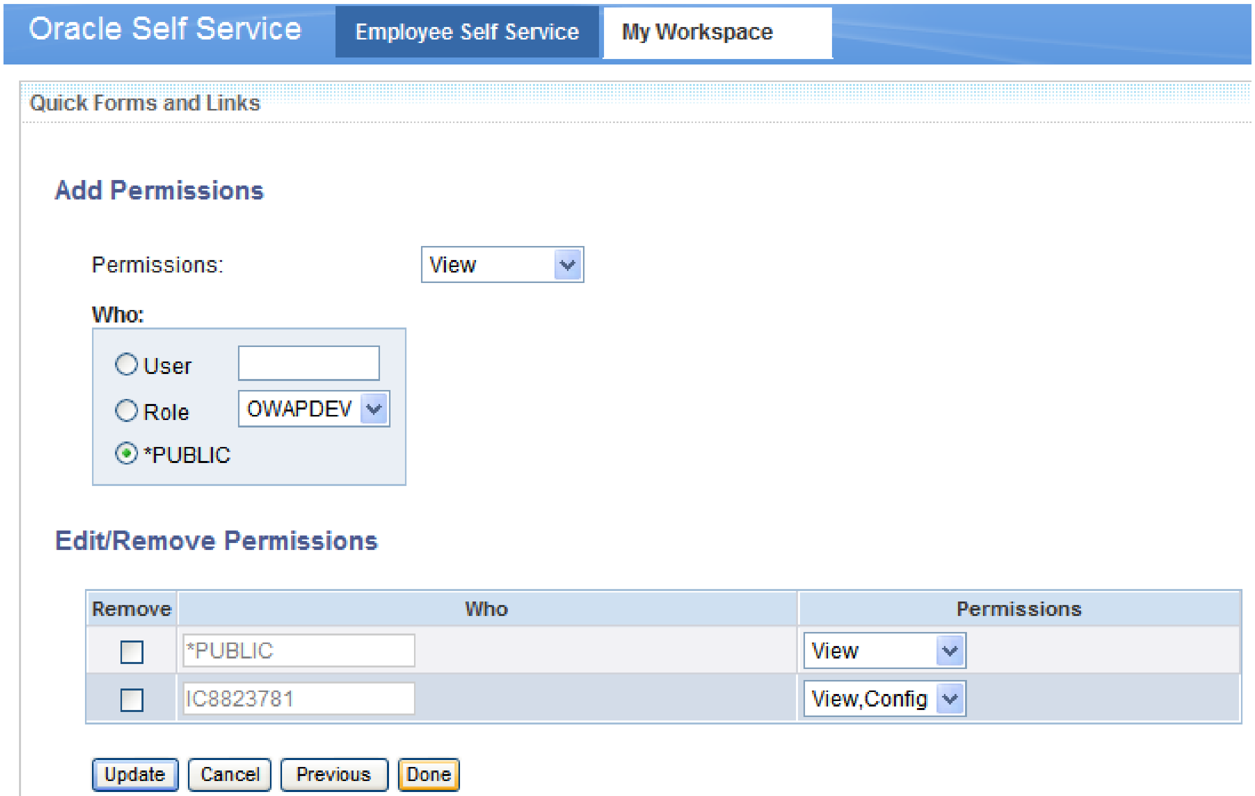


38. Make sure that the "Create a new portlet of portlet type" radio button is selected and then select "HTML Portlet" from the list.

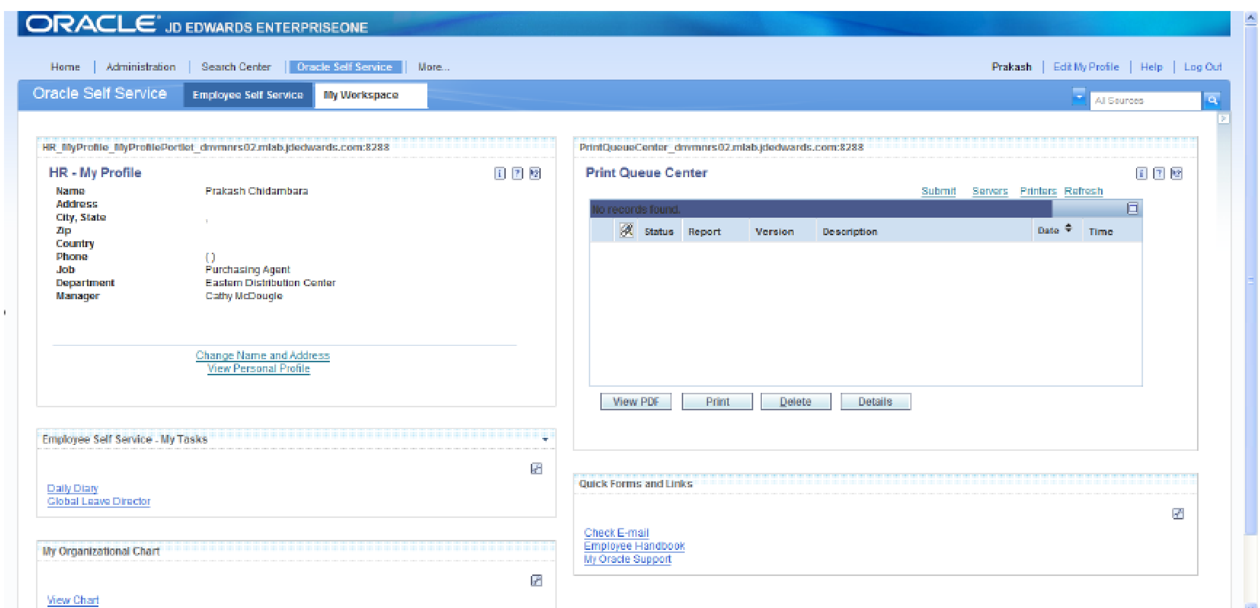


39. Enter the Name as "QuickF&L" and Title as "Quick Forms and Links" and paste the following text in the "HTML Code" text area. Click next.

```
<A HREF="https://stbeehive.oracle.com/bcentral/">Check E-mail</a><br>
<A HREF="https://idcweb.idc.oracle.com/HR/infor/Employee_
Handbook.html">Employee Handbook</a><br>
<A HREF="https://support.oracle.com/CSP/ui/flash.html/">My Oracle
Support</a><br>
```



40. Set the required permissions and click "Done".



41. The above image displays the completed My Workspace page.

Glossary

CSS

Abbreviation for Customer Self Service.

ESS

Abbreviation for Employee Self Service.

RSS

Abbreviation for Requisition Self Service.

SRM

Abbreviation for Supplier Relationship Management.

Isolated URI (IURI) portlet

This type of portlet is the most flexible because it is not actually integrated into the Portal. IURI portlets allow you full access to the browser frame and to take existing web content and display it in the Portal.

URI portlet

This type of portlet always requires interaction between the Portal and a web server. URI portlets can be written as CGI, Java servlets, or HTML pages, and they can reside on a server other than the Portal server. URI portlets tend to be slower than the other portlets.

HTML portlet

This type of portlet requires no interaction with an external server, so it provides quick response with very little external resource load. HTML portlets can contain references to applets, ActiveX controls, and images, but the HTML is taken directly from JD Edwards EnterpriseOne database, so the content is static. You can take advantage of pass-through functions, such as RunOWApp and addRunOWAppFI with HTML portlets as well. These functions enable you to launch JD Edwards EnterpriseOne applications.

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