JD Edwards EnterpriseOne Applications

Buyer Workspace and Supplier Self Service Implementation Guide

9.2

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Contents

Preface i

1 Introduction to JD Edwards EnterpriseOne Supplier Relationship Management Collaboration 1

JD Edwards EnterpriseOne SRMC Overview 1
JD Edwards EnterpriseOne SRMC Business Processes 1
JD Edwards EnterpriseOne SRMC Implementation 2

2 Setting Up Supplier Self-Service and Buyer Workspace in JD Edwards EnterpriseOne 5

Setting Up Common Fields for Supplier Self-Service and Buyer Workspace 5
Setting Up Purchase Order Acknowledgement and Change Approvals 6
Setting Up Purchase Order Shipment Notification 19
Setting Up Receipt Routing 24
Setting Up Purchase Order Inquiry 27
Setting Up Inventory Inquiry 30
Setting Up Receipt Inquiry 32
Setting Up Payment Inquiry 34
Setting Up Supplier Release Scheduling 39

3 Configuring the SRM Portlet Using the Configuration Wizard 43

Understanding the SRM Portlet 43
Configuring the Portlet 43
Copying Alert Configuration From Supplier to Supplier (Release 9.2 Update) 62

4 Processing the Procurement Cycle 65

Understanding the Procurement Cycle 65
Acknowledging Purchase Orders 65
Processing Shipment Notifications and Receipt Routing 69
Reviewing Inventory Information 72

Reviewing Purchase Order Information 73
Reviewing Receipt Information 74
Reviewing Payment Information 75

5 Managing the Lean Procurement Process in the SRM Portlet 77
Understanding Lean Procurement within the SRM Portlet 77
Processing Supplier Release Schedules Using the SRM Portlet 77
Processing Kanbans Using the SRM Portlet 80

6 Appendix A - Self-Service Programs 83
83

Index 89

Preface

1 Introduction to JD Edwards EnterpriseOne Supplier Relationship Management Collaboration

JD Edwards EnterpriseOne SRMC Overview

Note: The support for OW Portal and Collaborative Portal/IBM WebSphere Portal has been deprecated starting with Tools Release 9.2.26.2.

The JD Edwards EnterpriseOne SRM portlet from Oracle, in conjunction with the Collaborative Portal, enables your suppliers to access timely and accurate information about their orders at their convenience, without having to wait for a response from your purchasing department. When you allow suppliers quick and cost-effective access to your enterprise information, not only can suppliers more easily conduct business with you, but you can also increase your supply chain efficiency and improve your relationships with suppliers.

The JD Edwards EnterpriseOne SRM portlet, used in conjunction with the Collaborative Portal, provides you with search capabilities on purchase orders, inventory, and schedules, and displays alerts to inform you when a purchase order needs acknowledgement or a schedule has changed.

The fully customizable portlet contains various tasks and alerts that enable you to access certain applications in different ways. For example, you might select the appropriate task, search for specific information before accessing the application, or receive alerts that you can use to access the application. The way that your system administrator has configured the portal determines the tasks, searches, and alerts that you see.

Note: If your company previously purchased SRM Supplier Self-Service functionality with JD Edwards EnterpriseOne Xe or JD Edwards EnterpriseOne 8.9, the original Supplier Self-Service applications and alert portlets are still available and may be added to the Collaborative Portal by your system administrator.

You can also set up viewable portlets in JD Edwards EnterpriseOne Supplier Relationship Management. Viewable portlets differ from configurable portlets in that they cannot be modified by users once they have been initialized.

See “Setting Up Viewable and Configurable Portlets" in the *JD Edwards EnterpriseOne Portal Content Configuration Guide* .

JD Edwards EnterpriseOne SRMC Business Processes

The JD Edwards EnterpriseOne SRM portlet supports these business processes:

- The procurement cycle.
- Supplier release scheduling.

We discuss these business processes in the business process chapters in this implementation guide.

JD Edwards EnterpriseOne SRMC Implementation

This section provides an overview of the steps that are required to implement the SRM portlet.

In the planning phase of the implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including the installation guides and troubleshooting information.

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne Human Resources, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time required to search and download ESUs by 75 percent or more and enables you to install multiple ESUs at one time.

See *JD Edwards EnterpriseOne Tools Software Updates Guide* .

Installation Steps for the JD Edwards EnterpriseOne Collaborative Portal

Note: The support for OW Portal and Collaborative Portal/IBM WebSphere Portal has been deprecated starting with Tools Release 9.2.26.2.

This guide does not describe in detail how to install and configure the Collaborative Portal. However, this section provides an overview of the general steps involved in installing and configuring the Collaborative Portal.

Use this table as a guide to the installation and configuration process for the Collaborative Portal and the JD Edwards EnterpriseOne portlets. You should perform the steps in the order listed.

- Verify that you meet the minimum technical requirements (MTRs) to implement the JD Edwards EnterpriseOne Collaborative Portal.
- Install and configure the JD Edwards EnterpriseOne system.

  Apply the updates, service packs, or Electronic Software Updates (ESUs) specified in the MTRs.

  See your JD Edwards EnterpriseOne installation documentation.
- Install and configure the IBM WebSphere Portal.

  You can locate the latest version of the IBM WebSphere Portal from the Certifications tab on the My Oracle Support page.

  See *JD Edwards EnterpriseOne HTML Server on WebSphere Reference Guide for IBM i on Power System*
- Install and configure the JD Edwards EnterpriseOne Collaborative Portal.

  JD Edwards EnterpriseOne Tools IBM WebSphere Portal Reference Guide
- Install the SRMportlets.war file in the Collaborative Portal.

  WebSphere Portal for Multiplatforms:

  See JD Edwards EnterpriseOne Tools IBM WebSphere Portal Reference Guide.

- Create pages and add portlets to pages in the Collaborative Portal.

  WebSphere Portal for Multiplatforms:

  See JD Edwards EnterpriseOne Tools IBM WebSphere Portal Reference Guide.

SRMC Implementation Steps

This table lists the suggested application-specific implementation steps for JD Edwards EnterpriseOne Supplier Relationship Management Collaboration.

1. Set up user-defined codes (UDCs), versions, processing options, and specific applications in JD Edwards EnterpriseOne.

   See *Setting Up Supplier Self-Service and Buyer Workspace in JD Edwards EnterpriseOne*.
2. Configure the SRM portlet in the Collaborative Portal.

   See *Configuring the SRM Portlet Using the Configuration Wizard*.

2 Setting Up Supplier Self-Service and Buyer Workspace in JD Edwards EnterpriseOne

Setting Up Common Fields for Supplier Self-Service and Buyer Workspace

This section discusses how to:

- Set up common user-defined codes (UDCs) for supplier self-service and buyer workspace.
- Set up versions for supplier self-service.

Setting Up Common User-Defined Codes for Supplier Self-Service and Buyer Workspace

Multiple self-service programs use the user-defined code that is discussed in this section.

Self Service Order Types (43/OT)

This UDC defines the values in the order type filter drop-down list, which you use to configure several queries. The system displays the values in the Description 01 field in the drop-down list in the order that is specified by the values in the Codes field. The portal passes the associated value in the Special Handling field to JD Edwards EnterpriseOne to perform the query. You may add or remove values, or reset the sequence.

This table is an example of possible codes:

Codes	Description 01	Special Handling
01	All Order Types	
02	Purchase Order	OP
03	Direct Ship Order	OD
04	Human Factor Orders	OH
05	KanBan	K1
06	Transfer Orders	OT
07	Other PO Types	OH
08	Capital Orders	OC

Codes	Description 01	Special Handling

Setting Up Versions for Supplier Self-Service

You must set up separate versions of the following programs for buyers and suppliers:

- Purchase Orders (P4310)
- Self Service - Purchase Order Inquiry (P4310SS)
- Self-Service - Purchase Order Receipts (P4312S)
- Purchase Receipts Inquiry (P43214)

You must activate the self-service processing option for the supplier versions of these programs. Activating self-service for a version causes that version to filter the data that the version can display based on the address book number of the user. By activating self-service for those versions that suppliers use, suppliers can view only their own orders.

Do not activate the self-service processing option for the buyer versions of these programs as they should not call self-service activated versions of other programs. If a buyer uses a version that had self-service activated, the buyer would not be able to see any orders because the system display only orders for which the buyer's address book number was listed as the supplier.

Setting Up Purchase Order Acknowledgement and Change Approvals

This section provides an overview of purchase order acknowledgement and change approvals and discusses how to:

- Set up user-defined codes for purchase order acknowledgement.
- Set up order activity rules for purchase order acknowledgement.
- Set up tolerance rules for purchase order acknowledgement change approvals.
- Set up date tolerances for purchase order acknowledgement change approvals.
- Set up a buyer distribution list.
- Set up workflow queue properties.
- Set processing options for SRM - PO Acknowledgement (P43S01).

Understanding Purchase Order Acknowledgement and Change Approvals

In a typical trading environment, suppliers must be able to communicate with buyers about pending purchase orders. Before shipping the items on the purchase order, suppliers usually want to review and perhaps change the purchase order when planning to fulfill the order. The SRM - PO Acknowledgement program (P43S01) enables suppliers to be informed of incoming purchase orders so that they can respond. Using the PO Acknowledgement program, you can view the buyer attachment and add a supplier attachment.

Note: The SRM - PO Acknowledgement program (P43S01) is available to both the supplier and buyer.

For only those purchase orders that are specific to the supplier, the supplier can:

- Search for purchase orders using multiple types of queries.
- Change purchase order information, such as payment terms and carrier information.
- Acknowledge a purchase order with line splits.

  The system splits a purchase order into multiple order lines, which enables you to acknowledge an order by multiple dates, prices, carriers, or payment terms
- Acknowledge purchase orders with or without changes to purchase order information such as price, payment terms, carrier, and delivery date.

The buyer can use the SRM - PO Acknowledgement program to review unacknowledged purchase orders by supplier.

Note: You cannot use the SRM - PO Acknowledgement program for kit items. Splitting a purchase order for a kit item into multiple order lines creates potential for data inaccuracies.

Line Splits

When the supplier acknowledges a purchase order with line splits, the following considerations apply:

- If the supplier is using approval processing, the system splits lines only after the changes to the purchase order information have been approved.
- After the system creates split lines (and after the split lines have been approved if the supplier uses approval processing), the system saves the split lines as acknowledged and begins the tolerance checking process.
- If the supplier changes the order quantity and the value is less than the original quantity but greater than zero, the system splits the order into two lines.

  If the modified quantity is greater than the original quantity, then the modified quantity overrides the original quantity.
- When the supplier has changed the order quantity and the system has split the order into two lines, the first line contains the modified quantity.

  The second line contains the difference between the original quantity and modified quantity.
- After the system has split lines, the total quantity from all lines must equal the total original quantity; otherwise, the system does not allow the supplier to save changes.
- For multiple order lines, the first line inherits the line number from the parent order (that is, the order's line number before the system splits the order into multiple lines).

  The system increments the line numbers for the second and subsequent lines that result from changes to quantity by using a value of 0.01. For example, when the supplier changes the quantity for line 1.00, the new line that results from the split is line 1.01. If the supplier changes the quantity for line 1.01, then the next line is 1.02, and so on.
- For multiple order lines, the system uses the order information from the parent order (with the exception of the information that you can change, such as order quantity, unit price, promised delivery date, and line number) as default values for the multiple order lines.

  If you leave any of the information that you can change blank, the system uses the order information from the parent order as the default.

- You cannot split or change an original (parent) order line more than 99 times.
- When the supplier acknowledges an order that contains split lines, the supplier can either close the remaining quantity or leave the quantity open.

  If the supplier closes the remaining quantity, the system updates the status of the split line to canceled.

Approval of Changes to Purchase Orders

While acknowledging purchase orders, suppliers often change order information such as payment terms and carrier information. Buyers need to be aware of the changes and approve them to ensure that the changes meet the buyers' business requirements. The SRM - PO Acknowledgement program (P43S01) enables buyers to monitor all changes that suppliers make to order information during the purchase order acknowledgement process.

The system uses workflow to move orders through approval processing and the buyer can create tolerance rules for order quantity, unit price, and delivery date to specify the types of changes that require approval. The buyer can also designate the persons who are responsible for approving the changes and the buyer can approve the changes as well. The system can also notify both buyers and suppliers when an order enters approval processing and is approved or rejected.

The system uses the following workflow queues during the workflow approval process:

Code	Description	Usage
41	Changes Sent for Approval	The system uses this queue to send a message to the user who acknowledges a purchase order with changes that require approval.
43	Acknowledgement Approval	The system uses this queue to send a message to the buyer. This message contains a link to the Approve Purchase Order page. The buyer accesses this page to approve or reject the change. You must set up the queue properties for this queue to link to the Purchase Order Approval program (P43181). **Note:** You might have queue 43 set up in your system with another description. This queue receives the approval messages regardless of the description of the queue.
44	Acknowledgement Rejected	The system uses this queue to send a notification to the supplier when the buyer rejects the supplier's changes.
45	Acknowledgement Approved	The system uses this queue to send a notification to the supplier when the buyer approves the supplier's changes.

Note: You must set up these queues in UDC 02/MB using the codes that are specified here.

Forms Used to Set Up Purchase Order Acknowledgement and Change Approvals

Form Name	FormID	Navigation	Usage
Order Activity Rules - Revisions	W40204A	Procurement System Setup (G43A41), Order Activity Rules Click Add on the Work With Order Activity Rules form.	Set up or modify order activity rules.
Purchasing Tolerance Rules Revisions	W4322A	Procurement System Setup (G43A41), Tolerance Rules Click Add on the Work With Purchasing Tolerance Rules form.	Create tolerance rules to govern whether a change during acknowledgement requires the buyer's approval.
Supplier/Item Relationships	W43090B	Supplier Management (G43A16), Supplier/Item Information Click Add on the Work With Supplier/Item Relationships form.	Set up date tolerances.
Address Parent/ Child Revisions	W0150A	Address Book Organizational Structure (G01311), Structure Inquiry Click Add on the Work With Distribution Lists form.	Set up a distribution list to route acknowledgement approval messages to buyers. **Note:** You need to access this form only if the acknowledgement approving authority has been specified as the buyer distribution list in the processing options of P43S01.
Queues Property Revisions	W01133PB	Workflow Management Setup (G0241), Queue Properties On the Work With Queues form, locate queue 43 and click Select or click Add if a record for queue 43 does not already exist.	Set up queue 43 to link to the Purchase Order Approval program (P43181).

Setting Up User-Defined Codes for Purchase Order Acknowledgement

The user-defined codes discussed in this section are required for purchase order acknowledgement.

Acknowledge Header Sort Option (43/AH)

This UDC defines the values in the PO Acknowledgement Header Sort Option drop-down list and the associated data item aliases used in the query. You may add or remove values, or reset the sequence.

This table is an example:

Codes	Description 01	Special Handling
01	Purchase Order	DOCO
02	Supplier Number	AN8
03	Ordered Date	TRDJ
04	Order Type	DCTO

Filter Date Search SRM (43/DS)

This UDC defines the values in the filter date search drop-down list that you use to edit parameters for purchase order acknowledgement alerts and specifies the associated data item aliases used in the query. You may add or remove values, or reset the sequence.

This table is an example:

Codes	Description 01	Special Handling
01	Transaction Date	TRDJ
02	Requested Date	DRQJ

Filter Acknowledge Status (43/AS)

This UDC defines the values in the View Status drop-down that you use for purchase order acknowledgement inquiry.

This table lists hard-coded values:

Codes	Description 01
01	All
02	Pending
03	On Hold
04	Awaiting Approval

Acknowledgement Detail Sort Op (43/AQ)

This UDC defines the values in the Sort By drop-down that you use for purchase order acknowledgement inquiry.

This table lists hard-coded values:

Codes	Description 01
01	Quantity
02	Extended Price

Order Statuses (43/OS)

This UDC defines the values in the Route Status drop-down list that you use to define parameters for some purchase order queries and specifies the associated data item aliases in the query. The values in the Description 01 column are listed in the drop-down list in the order that is specified by the values in the Codes column. The portal passes the value in the Special Handling column to JD Edwards EnterpriseOne to perform the query. You may add or remove values, or reset the sequence.

This table is an example:

Codes	Description 01	Special Handling
01	Approval Process #1	230
02	Print Purchase Order Proof	240
03	Print Purchase Order	280
04	Record Supplier Shipment	370

Activity/Status Codes (40/AT)

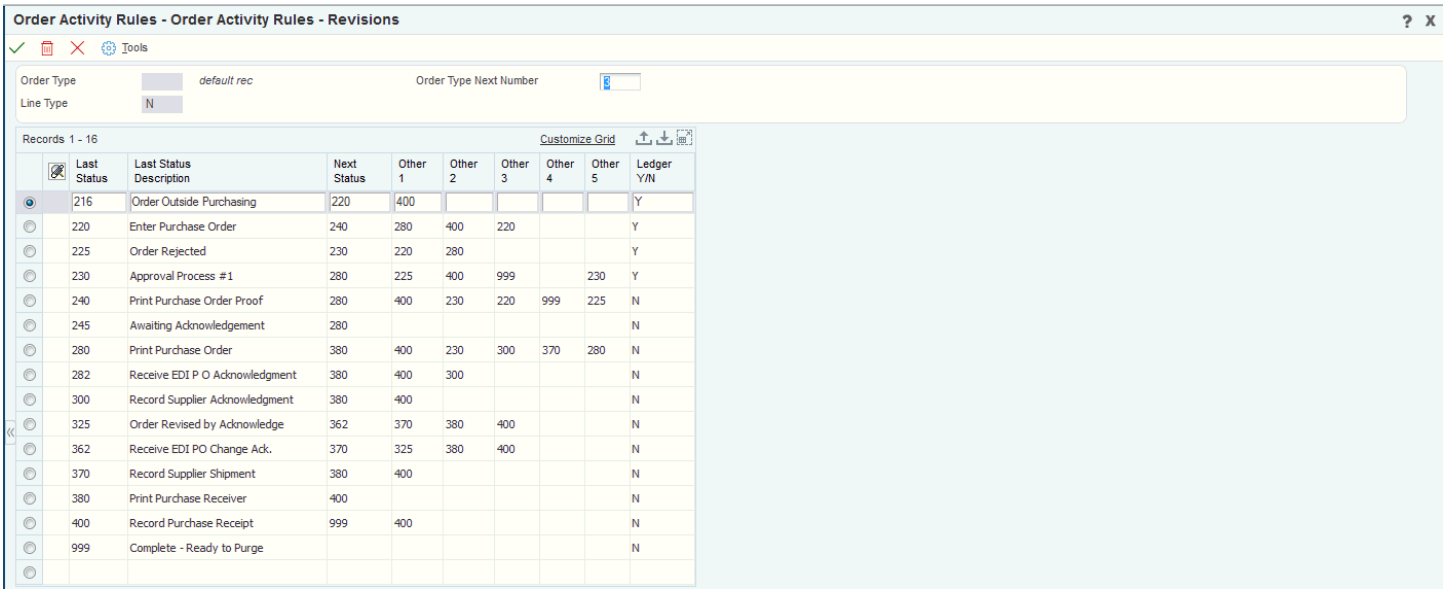
The Activity/Status Codes (40/AT) UDC defines the values of the purchase order statuses used in the order activity rules. This UDC is shipped with predefined data. You can change or delete the predefined data if it is not hard-coded, and add UDCs to meet your business requirements.

This table is an example:

Status Codes	Description 01
220	Enter Purchase Order
245	Awaiting Supplier Ack.
300	Awaiting Ack. Approval
325	Rejected Acknowledge Change
370	Awaiting Shipment
380	In Transit
400	Record Purchase Receipt
999	Complete - Ready to Purge

Setting Up Order Activity Rules for Purchase Order Acknowledgement

Access the Order Activity Rules - Revisions form.



Last Status	Last Status Description	Next Status	Other 1	Other 2	Other 3	Other 4	Other 5	Ledger Y/N
216	Order Outside Purchasing	220	400					Y
220	Enter Purchase Order	240	280	400	220			Y
225	Order Rejected	230	220	280				Y
230	Approval Process #1	280	225	400	999		230	Y
240	Print Purchase Order Proof	280	400	230	220	999	225	N
245	Awaiting Acknowledgement	280						N
280	Print Purchase Order	380	400	230	300	370	280	N
282	Receive EDI P O Acknowledgment	380	400	300				N
300	Record Supplier Acknowledgment	380	400					N
325	Order Revised by Acknowledge	362	370	380	400			N
362	Receive EDI PO Change Ack.	370	325	380	400			N
370	Record Supplier Shipment	380	400					N
380	Print Purchase Receiver	400						N
400	Record Purchase Receipt	999	400					N
999	Complete - Ready to Purge							N

Order Type

Enter the user-defined code (00/DT) that identifies the type of document. For example, you can enter OP to indicate Purchase Order.

Line Type

Specify the code that controls how the system processes lines on a transaction. For example, you can enter SP for Buyer Supplier Self Service.

Order Type Next Number

Specify the code that tells the system which next number series to use when creating order numbers for this order type. There are ten available Next Number series.

Last Status

Specify the user-defined code (40/AT) that indicates the status of the line. For example, when a purchase order is used in supplier self service module, it can go through the following statuses.

- 245: Awaiting Supplier Ack.
- 300: Awaiting Ack. Approval.
- 325: Rejected Acknowledge Change.
- 370: Awaiting Shipment.
- 380: In Transit.
- 400: Record Purchase Receipt.
- 999: Complete - Ready to Purge.

Last Status Description

Displays a description of the last status code. The system populates the last status description when you enter a value in the Last Status field.

Next Status

Enter the user-defined code (system 40/type AT) indicating the next step in the order flow of the line type.

Other 1 - Other 5

Enter additional statuses that can be performed as the next step in the order process. Other 1 - Other 5 fields denote the other additional statuses allowed in the order process, in addition to the preferred status. The preferred status is the status defined in the Next Status field. Other 1 - Other 5 fields are optional.

Although the additional status is not the preferred or expected next step, this field is an allowed override. The system does not allow you to initiate an order line step or status if it is not defined either in the Next Status field or in the Other 1 - Other 5 fields. Other allowed status codes let you bypass processing steps. These other allowed status codes are often referred to in processing options as "override next status codes."

Ledger Y/N

Enter a code that indicates whether the system writes a record to the P.O. Ledger Detail File – Flexible Version table (F43199). Values are:

Y (yes): The system writes a record to the history table.

N (no): The system does not write a record to the history table

Order Processing Cycle

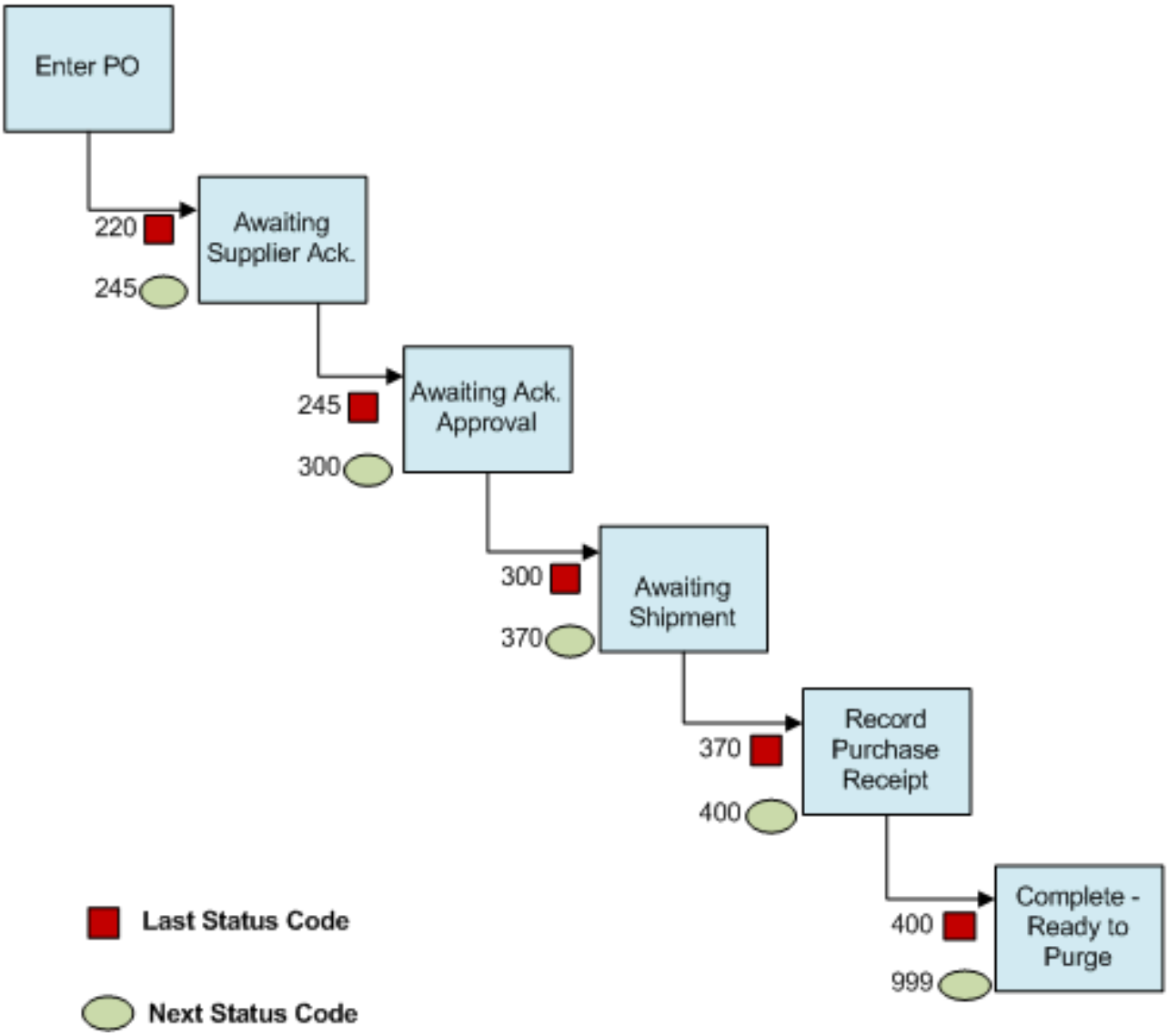
You use order activity rules to define the operations the system performs for a purchase order processing cycle and to indicate the progression of the steps.

You must set up order activity rules for a combination of order type and line type. You use user-defined status codes to set up the order activity rules. Each status code represents a step in the purchase order processing cycle, for example awaiting supplier acknowledgement.

Each detail line of an order contains a pair of status codes. These codes identify the last status and the next status to which the system advances the line. The last status code represents the last operation performed on the order. The next status code represents the next step in the purchase order processing cycle.

This diagram illustrates a typical status code progression in JD Edwards EnterpriseOne Buyer Workspace and Supplier Self Service:

Status Code Progression in Buyer Workspace and Supplier Self Service



For each purchase order processing cycle you set up, you must specify the order type and line type to which it applies. For example, the processing cycle illustrated applies to order type **OP** and line type **SP**. You can also change the progression of steps by indicating alternate next status codes.

Setting Up Tolerance Rules for Purchase Order Acknowledgement Change Approvals

Access the Purchasing Tolerance Rules Revisions form.

Function (Program)
Specify **4** to identify the tolerances used for acknowledgement.

> **Note:** You might need to add the value **4** (Acknowledgement Tolerance) to UDC 43/FT.

Tolerance Percentage or Tolerance Amount
If a supplier changes an order line by a percentage or amount that exceeds the tolerance percentage or tolerance amount, the buyer must approve the change.

The system uses the absolute value to determine whether a change exceeds the tolerance. Therefore, a reduction in quantity or price can exceed tolerance just as an increase in quantity or price can.

> **Note:**
>
> - *"Creating Tolerance Rules" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .

Setting Up Date Tolerances for Purchase Order Acknowledgement Change Approvals

Access the Supplier/Item Relationships form.

Days Allowed Early
The number of days prior to the promised date for which delivery of the item is acceptable. If the supplier changes the delivery date by more than the number of days that is specified in this option, the buyer must approve the changes.

Days Allowed Late
The number of days after the promised date for which delivery of the item is acceptable. If the supplier changes the delivery date by more than the number of days that is specified in this option, the buyer must approve the changes.

> **Note:** To enable zero date tolerance, you must set up hard coded user-defined code 1 with description 'Zero Lead Days' in 43S/ZD, and also select the Zero Lead Days check box for the selected item/supplier combination using the Supplier / Item Relationship program (P43090).

> **Note:**
>
> - *"Creating Supplier and Item Relationships" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .

Setting Up a Buyer Distribution List

Access the Address Parent/Child Revisions form.

> **Note:** You need to set up a buyer distribution list only if the approving authority has been specified as the buyer distribution list in the processing options of P43S01.

Parent Number
Enter the address book number of the distribution list. The system uses this number to identify the buyer to whom approval messages should be routed. You specify the address book number of the distribution list in the processing options of the SRM - PO Acknowledgement program (P43S01).

This address number must exist in the Address Book Master table (F0101).

Structure Type
Specify AA (acknowledgement approval).

> **Note:** You might need to add the value AA to UDC 01/TS.

Address Number
Specify the address book number of the buyer to whom approval messages should be routed.

Setting Up Workflow Queue Properties

Access the Queues Property Revisions form.

Queues
Specify **43,** which is the Acknowledgement Approval queue.

Application
Specify **P43181,** which is the program that the buyer uses to approve or reject the changes that the supplier made to the purchase order. The buyer access this program through a link in the workflow message that the buyer receives in queue 43.

Form Name
Specify **W48181A.**

Version
Specify **ZJDE0001.**

Setting Processing Options for SRM - PO Acknowledgement (P43S01)

You can access the processing options for SRM - PO Acknowledgement (P43S01) using the Work With Interactive Versions program (P983051).

Use these processing options to supply the default values for the SRM - PO Acknowledgement program.

Defaults

These processing options specify the default values for various statuses.

1. Status Purchase Order Hold (Required)
Specify the status for orders that are placed on hold. The hold codes might apply to an individual line within the order or the order as a whole. You must specify a user defined code (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using.

2. Status Awaiting Acknowledgement (Required)
Specify the status of orders that are awaiting supplier acknowledgement. You must use a valid status (40/AT) that is defined in the order activity rules for this order type.

3. Status of Awaiting Approval (Required)
Specify the status of orders that the supplier has changed and that are now awaiting buyer approval.

4. Status of Approved Orders (Required)
Specify the status for orders that the supplier has acknowledged or approved.

5. Approver Address Book (Required)
Use this processing option to specify the approver's address book number. The workflow routes the order to this Address Book number for approval. When the 7. Approver Single Recipient processing option is blank, the address number in this option is used as the Parent Address Book number of the approver's distribution list in the workflow for approval. When 7. Approver Single Recipient is set to 2, the address number in this option is used as the single recipient approver address number in the workflow for approval.

6. Status of Rejected Acknowledgement (Required)
Use this processing option to identify the status of orders that are rejected during the acknowledgement process. You must use a valid status (40/AT) that has been defined in the order activity rules for this order type.

7. Approver Single Recipient (Required)
Use this processing option to determine whether a distribution list or a single recipient address book number is used in the SRM Acknowledgement Approval workflow. The workflow routes the order based on this processing option to the address book number specified for approval. Valid values are:

Blank: The system uses the distribution list for approval and uses the Address Book number specified in the 5. Approver Address Book processing option as the parent Address Book number of the approver's distribution list for workflow approvals.

1:The system enables a single recipient for approval and uses the Buyer number from the Purchase Order Detail Line as the single recipient approver for workflow approvals.

2: The system enables a single recipient for approval and uses the Address Book number specified in the 5. Approver Address Book processing option as the single recipient approver address number for workflow approvals.

Display

These processing options specify the types of information that the system displays.

1. Role of User (Required)
Specify the user role. Values are:

1: Buyer

2: Supplier

2. Order Type (Optional)
Specify the only order type that the system processes.

3. Item Cross Reference (Required)
Specify the cross-reference type code for supplier items. Enter a cross-reference type code from UDC 41/DT.

4. Maximum Number of Records to be Fetched (Required)
Specify the maximum number of records that the system retrieves and displays. It is recommended that you limit the maximum number of records to 100 or fewer.

5. Address Type Code (Required)
Specify the type code to display the supplier's Ship To address. Enter a type code from UDC 01/W0.

Versions

This processing option specifies which version of the Purchase Orders program (P4310) the system uses.

1. Version of PO Entry (P4310)
Specify which version of the Purchase Orders program (P4310) the system calls to make changes to processing option details during the acknowledgement process.

Setting Up Purchase Order Shipment Notification

This section provides an overview of shipment notifications and discusses how to:

- Set up user-defined codes for shipment notification.
- Set processing options for Self-Service - Purchase Order Receipts (P4312S).
- Set selected processing options for PO Receipts (P4312).

Understanding Shipment Notifications

Suppliers need to initiate shipment notification to let the buyer know that the shipment is in transit and to update the shipment status.

Suppliers have two methods available for notifying the buyer about shipped goods:

- Update the status to indicate that a purchase order line is in transit.

  This method enables the supplier to specify the quantity shipped, shipment date, and any additional shipment identification. The purchase order status is updated to In transit. This method also enables the same split line functions as the SRM - PO Acknowledgement program (P43S01).

- Initiate receipt routing.

  The Self-Service - Movement in Routing program (P43250SS) enables suppliers to move shipments into routing. Suppliers can specify the quantity, lot information, and a shipment identifier. Suppliers can also cancel any remaining quantity on the order.

To specify which method you are using, set the Shipment processing mode processing option on the Self-Service - Purchase Order Receipts program (P4312S). You also can set a processing option to notify the buyer about shipments.

When notifying buyers of orders in transit, the system sends electronic confirmation messages to the following users:

- The buyer who is associated with the purchase order detail line.
- The planner for the item.

Both electronic confirmation messages contain links to a program that displays purchase order detail lines for which the supplier notified the buyer that a shipment is in transit.

When you use the status update method, you first review the orders and line items that are ready for shipment. You can review both header and detail information. When you review the detail information, you can update the ship quantity, ship date, and container ID. You can decide whether to ship the entire quantity or a partial quantity.

When an order line is partially shipped, the system creates a new split line that reflects the partial shipment. The split line inherits the original order line number. The system increments the original line number by a value of 0.01, which is preceded by the original line number. For example, if the original line number is 1.2, then the new split line that results from the status update is numbered 1.21. The maximum number of split lines that the system can create is nine.

When you ship a partial quantity, you also can ship the order without intending to fulfill the outstanding quantity, provided that you set the appropriate processing option. The system cancels the order line that remains.

Setting Up User-Defined Codes for Shipment Notifications

The user-defined codes discussed in this section are required for purchase order shipment notifications.

Date Selection (43S/DS)

This UDC defines the values in the filter date search drop-down list that you use to edit parameters for purchase order shipment alerts and specifies the associated data item aliases used in the query. You may add or remove values, or reset the sequence.

This table lists hard-coded values:

Codes	Description 01	Special Handling
01	Order Date	TRDG
02	Requested Date	DRQJ
03	Promised Delivery Date	PDDJ
04	Promised Ship Date	PSDJ

Receipt Detail Sort (43/RD)

This UDC defines the values in the Sort Results By drop-down list that the PO Awaiting Shipment Advanced Search task uses and specifies the associated data item aliases that are used in the query.

This table lists hard-coded values:

Codes	Description 01	Special Handling
01	Purchase Orders	DOCO
02	Item	ITM
03	Supplier	AN8
04	Order Date	TRDJ
05	Requested Date	DOCO
06	Shipment Identifier	CNID

Receipt Header Sort (43/RH)

This UDC defines the values in the Sort By drop-down list that the purchase orders awaiting shipment alerts uses and specifies the associated data item aliases that are used in the query.

This table lists hard-coded values:

Codes	Description 01	Special Handling
01	Order Number	DOCO
02	Destination	SHAN
03	Supplier	AN8
04	Order Date	TRDJ
05	Requested Date	DRQJ

Setting Processing Options for Self-Service - Purchase Order Receipts (P4312S)

You can access the processing options for Self-Service - Purchase Order Receipts (P4312S) using the Work With Interactive Versions program (P983051).

Use these processing options to supply the default values for the Self-Service - Purchase Order Receipts program.

(BRA) Display

This processing option is used in Brazil only.

1. Nota Fiscal Document Type

Enter a user defined code (00/DT) that identifies the document type for nota fiscal documents.

Processing

These processing options specify the next status or routing information for the shipment.

1. Advance Status Only

Enter **1** to advance the status of the purchase order. Leave this processing option blank if you do not want to advance the status.

> **Note:** When you set the value of the Advance Status Only processing option to **1**, ensure that you also set the value of the Shipment Processing Mode processing option to **1** to advance the status of the order. See *7. Shipment processing mode* processing option on the Processing tab of the Self-Service - Purchase Order Receipts program (P4312S).

2. Next Status for Advance Status Only

Specify a user defined code (40/AT) to specify the status to which the order should be advanced when it is shipped.

3. Cancel Remaining

Leave this processing option blank to display canceled purchase order lines or enter **1** if you do not want to display canceled lines.

4. Supplier Item X-Reference

Specify the cross-reference type code for supplier items. Enter a cross-reference type code from UDC 41/DT.

5. Purchasing Order Types

List all purchase order document types to view in the Self-Service - Purchase Order Receipts program. List document types one after another with no spaces or characters in between.

6. Default Route Code

If you are receiving the item to routing, specify the default route code that the system uses if a supplier/item relationship is not set up for a self-service supplier.

7. Shipment processing mode

Enter **1** to use notify shipment functionality or leave this processing option blank to use receipt to route functionality.

If you enter 1, the system uses the value in the Next Status for Advance Status Only processing option to advance the status of the order. If you leave this processing option blank, the system uses the route code from the supplier/item relationship or the default route code from the processing options to route the order.

Change Notification

These processing options specify whether to notify the buyer or planner of the receipt.

1. Buyer

Enter **1** to notify the buyer of the receipt.

2. Planner

Enter **1** to notify the planner of the receipt.

Versions

These processing options identify versions of programs that are called by the Self-Service - Purchase Order Receipts program.

1. Receipts (P4312)
Specify the version of PO Receipts (P4312) to use.

2. Transaction Log (P43001SS)
Specify the version of Procurement Self-Service Transaction Log (P43001SS) to use.

Setting Selected Processing Options for PO Receipts (P4312)

This section lists only those processing options that are relevant to self-service.

Status Default

These processing options enable you to control which status codes the system uses for receipts.

1. Acceptable Incoming Status Code 1
Use this processing option to specify a next status. Orders are eligible for receipt when they have the next status that you specify for this processing option.

Before you complete this processing option, review the order activity rules that you have set up.

2. Acceptable Incoming Status Code 2
Use this processing option to specify a next status. Orders are eligible for receipt when they have the next status that you specify for this processing option.

Before you complete this processing option, review the order activity rules that you have set up.

3. Acceptable Incoming Status Code 3
Use this processing option to specify a next status. Orders are eligible for receipt when they have the next status that you specify for this processing option.

Before you complete this processing option, review the order activity rules that you have set up.

4. Outgoing Status for Partial Receipts
Use this processing option to specify the next status to which the order advances after a partial receipt.

Before you complete this processing option, review the order activity rules that you have set up.

5. Outgoing Status for Closing
Use this processing option to specify the next status to which the order advances after the system closes or fully receives the detail line.

Use status code 999 for closed or fully received detail lines.

6. Outgoing Status for Canceling
Use this processing option to specify the next status to which the order advances after the system cancels a detail line.

Use status code 999 for canceled detail lines.

Process

This processing enables you to activate receipt routing.

11. Receipt Routing

Specify **2** to initiate the default route rule from Self-Service - Purchase Order Receipts (P4312S).

Setting Up Receipt Routing

This section provides an overview of receipt routing, lists a prerequisite, and discusses how to:

- Set up user-defined codes for receipt routing.
- Set processing options for Self-Service - Movement in Routing (P43250SS).

Understanding Receipt Routing

When configuring the portal, buyers specify the suppliers and other individuals who are authorized to move goods. Provided that you have the appropriate authority, you can move an item through the receipt routing process, which completes the receipts process and updates inventory. Typically, the person who is responsible for moving an item through receipt routing is the supplier. However, a customs operator, buyer, or transportation provider might also move an item through receipt routing.

Using the Self-Service - Movement in Routing program (P43250SS), you can search for orders that are in the routing process by:

- Item number
- Purchase order number
- Order type
- Supplier
- Route step
- Order date
- Container ID

Steps represent the various statuses within the routing process, and you predefine the steps in the processing options for the Receipt Routing Movement and Disposition program (P43250). To perform movement in routing, you must have a multi-step route. You cannot have a single-step route.

After you locate and review the appropriate order, you can move the items on the order and change detail information such as the quantity to move, receipt date, lot information, container ID, and reason code.

After you change values for the order information, the system updates the following tables:

- Purchase Order Receiver File (F43121)
- Purchase Order Receipt Routing File (F43092)
- Account Ledger (F0911)
- P.O. Detail Ledger File - Flexible Version (F43199)
- Item Location File (F41021)

Prerequisite

Set up receipt routes.

See *"Routing Receipts" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .

Setting Up User-Defined Codes for Receipt Routing

The user-defined codes that are discussed in this section are required for receipt routing.

Movement Detail Sort Options (43/OD)

This UDC defines the values in the Sort Results By drop-down list that are used by the Movement In Route Advanced Search task and specifies the associated data item aliases that are used in the query.

This table contains an example of possible codes:

Codes	Description 01	Special Handling
01	Order Number	DOCO
02	Order Type	DCTO
03	From Step	OPRC
04	Order Date	TRDJ

Movement Header Sort Options (43/OH)

This UDC defines the values in the Sort By drop-down list that are used by the purchase orders at route step alerts and specifies the associated data item aliases that are used in the query.

This table contains an example of possible codes:

Codes	Description 01	Special Handling
01	Purchase Order	DOCO
02	Order Type	DCTO
03	Order Date	TRDJ

Self-Service Movement Steps (43/MS)

This UDC defines the movement steps that are used in various drop-down lists by the purchase orders at route step alerts and the Movement In Route Advanced Search task.

This table lists possible values:

Codes	Description 01
01	All
02	TRAN
03	DOCK
04	STK
05	INSP

Setting Processing Options for Self-Service - Movement in Routing (P43250SS)

Use these processing options to supply the default values for the Self-Service - Movement in Routing program.

Defaults

This processing option specifies the default value that the system uses to sort information.

Header Screen Sort Option

Specify the sort criteria to use to display orders. Enter a value from UDC 43/OH.

Processing

This processing option specifies the supplier item cross-reference type code.

Supplier Item X-Reference

Specify the type of cross reference that is set up for the supplier. Enter a value from UDC 41/DT. Examples of cross reference types include:

- Substitutes
- Replacements
- Bar codes
- Supplier item numbers

Versions

This processing option specifies which version of the Receipt Routing Movement and Disposition program (P43250) that the system uses.

1. Movement and Disposition (P43250)

Specify the version that the system uses when you are using the Receipt Routing Movement and Disposition program (P43250). If you leave this field blank, the system uses the **ZJDE0001** version.

Setting Up Purchase Order Inquiry

This section provides an overview of purchase order inquiry and discusses how to:

- Set up user-defined codes for purchase order inquiry.
- Set processing options for SRM - PO Inquiry (P43S05).

Understanding Purchase Order Inquiry

The SRM - PO Inquiry program (P43S05) enables you to review order information regardless of where an order is in the Procurement process. For example, an order might be awaiting acknowledgement, purchase order approval, shipment status update, and so on.

The PO Inquiry program enables you to view both buyer and supplier attachments.

You can review order information for orders that have the following statuses:

- Awaiting acknowledgement
- Awaiting shipment
- In transit
- Received

The system displays only the order information that pertains to the current status of the order.

> **Note:** The SRM - PO Inquiry program (P43S05) enables you to review information only and does not support any transactions.

Setting Up User-Defined Codes for Purchase Order Inquiry

This section lists the user-defined codes that are required for purchase order inquiry.

PO Inquiry Status Meaning (43S/IS)

This UDC associates applications with status values. The SRM - PO Inquiry (P43S05) application uses this UDC to identify the application to call when the user clicks the status link for a purchase order line.

You specify the status value in the Codes field and the application to associate with that status value in the Description 02 field.

This table is an example:

Codes	Description 01	Description 02	Special Handling
	All Order Statuses	P43S01	7
245	Awaiting Acknowledgement	P43S01	1
280	Awaiting Receipt to Route	P4312S	3
370	Awaiting Shipment	P4312S	3
380	In Transit		4
400	Received	P43121SS	5
999	Received/Closed	P43121SS	5

PO Inquiry Search Dates (43S/ID)

This UDC defines the values in the filter date search drop-down list that the system uses to edit parameters for the Purchase Orders Next × days and Purchase Orders Past Date alerts and specifies the associated data item aliases in the query. You may add or remove values, or reset the sequence.

This table lists hard-coded values:

Codes	Description 01	Special Handling
01	Order Requested Date	DRQJ
02	Order Entered Date	TRDJ
03	Order Shipment Date	ADDJ
04	Order Delivery Date	PDDJ

PO Inquiry View Status (43S/IV)

This UDC defines the values in the View Status drop-down list that the system uses for purchase order inquiry.

This table lists hard-coded values:

Codes	Description 01
01	All
02	Awaiting Acknowledgement
03	Awaiting Approval
04	Awaiting Shipment

PO Inquiry Sort Options (43/IQ)

This UDC defines the values in the Sort By drop-down list that the Purchase Orders Advanced Search task uses and specifies the associated data item aliases in the query.

This table lists hard-coded values:

Codes	Description 01	Special Handling
01	Supplier	AN8
02	Order Number	DOCO
03	Extended Price	AEXP
04	Order Date	TRDJ
05	Requested Date	DRQJ
06	Quantity	UORG

Setting Processing Options for SRM - PO Inquiry (P43S05)

You can access the processing options for SRM - PO Inquiry (P43S05) using the Work With Interactive Versions program (P983051).

Default

This processing option selects purchase order documents based on document type.

Status of Order Inquiry

List all purchase order document types to view in the self-service purchase order inquiry program. List document types one after another, separated by commas. You may list as many as eight statuses.

Display

These processing options control the display of information in the self-service purchase order inquiry program.

Role of User

Enter a code to designate the user role for SRM - PO Inquiry (P43S05). Codes are:

1: Buyer

2: Supplier

Order Type

Specify the order type that the system processes in the SRM - PO Inquiry program (P43S05).

Item Cross Reference

Specify the cross-reference type code for supplier items. Enter a cross-reference type code from UDC 41/DT.

Maximum Number of Records Found

Specify the maximum number of records that the system retrieves and displays. It is recommended that you limit the maximum number of records to 200 or fewer.

Versions

These processing options enable you to specify versions of the programs that are called by the SRM - PO Inquiry program (P43S05).

Notify Shipment (P4312S)

Use this processing option to specify which version of the Notify Shipment program (P4312S) that the system uses for the SRM - PO Inquiry program (P43S05).

Receipt Route (P4312S)

Use this processing option to specify which version of the Receipt Route program (P4312S) that the system uses for the SRM - PO Inquiry program (P43S05).

Setting Up Inventory Inquiry

This section provides an overview of inventory inquiry and discusses how to set processing options for Self-Service - Inventory Information Inquiry (P41204).

Understanding Inventory Inquiry

Suppliers can use self-service to review a variety of inventory information, such as general item information, item quantities, and reorder points. A supplier might want to review inventory to determine when an item needs to be reordered and to review items for which the quantity is lower than safety stock. Processing options for the Self-Service - Inventory Information Inquiry program (P41204) indicate whether the user is a supplier or customer.

Setting Processing Options for Self-Service - Inventory Information Inquiry (P41204)

You can access the processing options for Self-Service - Inventory Information Inquiry (P41204) using the Work With Interactive Versions program (P983051).

Defaults

These processing options control the display of information in the self-service inventory inquiry program.

1. Display Option

Specify how the system displays records and quantities for the default display option. Values are:

Blank or **1:** The system displays records in summary mode and quantities at the item level.

2: The system displays records in detail mode and quantities at the item/branch level.

2. Supplier View Option

Specify the default view option for suppliers. Values are:

01: Display all items.

02: Display only the items whose on-hand quantity is zero or a negative number.

03: Display only the items whose on-hand quantity is below the safety stock level.

3. Customer View Option

Specify the default view option for customers. Values are:

01: Display all items.

02: Display only the items with a available quantity greater than zero.

4. Quantity Display Option

Specify how the system displays quantities. Values are:

Blank: The system displays quantities in the actual numeric value.

1: The system displays **Yes** if the actual quantity exceeds zero. The system displays **No** if the actual quantity is less than or equal to zero.

Process

These processing options enable the self-service inventory inquiry program to search for and display cross-reference information.

1. Supplier Cross-Reference Type

Specify the cross-reference type code (UDC 41/DT) that the system uses to search for cross-reference information for a supplier item number. Cross-references associate your internal item numbers with the supplier's item numbers. You can set up items in the Item Master table (F4101), and create the cross-reference information in the Item Cross Reference program (P4104). If you leave this processing option blank, the system does not display and process any cross-reference information.

2. Customer Cross-Reference Type

Specify the Cross Reference Type code (UDC 41/DT) that the system uses to search for cross-reference information for a customer item number. Cross-references associate your internal item numbers with the customer's item numbers. You can set up items in the Item Master table (F4101), and create the cross-reference information in the Item Cross Reference program (P4104). If you leave this processing option blank, the system does not display and process any cross-reference information.

3. Supplier Search Type

Specify the search type for the supplier. If you leave this processing option blank, the system uses search type **V**.

4. Customer Search Type

Specify the search type for the customer. If you leave this processing option blank, the system uses a search type of **C**.

Setting Up Receipt Inquiry

This section provides an overview of receipt inquiry and discusses how to:

- Set up user-defined codes for receipt inquiry.
- Set processing options for SRM - Receipt Inquiry (P43121SS).

Understanding Receipt Inquiry

The SRM - Receipt Inquiry program (P43121SS) enables both suppliers and buyers to review multiple receipts at once. You can review the various statuses of the receipts and use links to other programs to process the receipts further and inquire about payment information. After you have searched for receipts, the system displays the receipts with a summarized view of quantities and amounts, and it also displays information such as quantity stocked, quantity that has been paid for, quantity awaiting payment, quantity that is in routing, and so on. You can click a link to access movement in routing functionality and to move the order line to another status.

Setting Up User-Defined Codes for Receipt Inquiry

This section lists the user-defined codes that are required for receipt inquiry.

Receipt Inquiry Search Dates (43S/RD)

This UDC defines the values in the Search By Date drop-down that the system uses for receipt inquiry and specifies the associated data item aliases that are used in the query.

This table lists hard-coded values:

Codes	Description 01	Special Handling
01	Receipt Date	RCDJ
02	PO Requested Date	DRQJ
03	PO Promised Delivery Date	PDDJ

Codes	Description 01	Special Handling
04	PO Promised Shipment Date	PSDJ

Receipt Inquiry Status (43S/RS)

This UDC defines the values in the View Status drop-down that the system uses for receipt inquiry.

This table lists hard-coded values:

Codes	Description 01
0	All
1	In Route
2	In Stock
3	Vouchered

Receipt Inquiry Sort Options (43/RQ)

This UDC defines the values in the Sort By drop-down list that the system uses for receipt inquiry and specifies the associated data item aliases in the query.

This table is an example of possible values:

Codes	Description 01	Special Handling
01	Supplier	AN8
02	Purchase Order Number	DOCO
03	Receipt Extended Price	AREC
04	Receipt Date	RCDJ
05	Purchase Order Requested Date	DRQJ

Setting Processing Options for SRM - Receipt Inquiry (P43121SS)

You can access the processing options for SRM - Receipt Inquiry (P43121SS) using the Work With Interactive Versions program (P983051).

Display

These processing options control the display of information in the self-service receipt inquiry program.

Role of User
Enter a code to designate the user role for SRM - Receipt Inquiry (P43121SS). Codes are:

1: Buyer

2: Supplier

Order Type
Specify the order type that the system processes in the SRM - Receipt Inquiry program (P43121SS).

Item Cross Reference
Specify the cross-reference type code for supplier items. Enter a cross-reference type code from UDC 41/DT.

Maximum Number of Records Found
Specify the maximum number of records that the system retrieves and displays. We recommend that you limit the maximum number of records to 200 or fewer.

Versions

These processing options enable you to specify versions of the programs that are called by the SRM - Receipt Inquiry program (P43121SS).

Supplier Payment Inquiry Self Service (P04111)
Use this processing option to specify which version of the Supplier Payment Inquiry Self Service program (P04111) that the system uses for the SRM - Receipt Inquiry program (P43121SS).

Movement in Routing Self Service (P43250SS)
Use this processing option to specify which version of the Movement in Routing Self Service program (P43250SS) that the system uses for the SRM - Receipt Inquiry program (P43121SS).

Setting Up Payment Inquiry

This section provides an overview of payment inquiry and discusses how to:

- Set up user-defined codes for payment inquiry.
- Set processing options for Self-Service - Supplier Payment Inquiry (P04111).
- Set processing options for Self Service - Purchase Order Inquiry (P4310SS).

Understanding Payment Inquiry

Suppliers can use self-service to review the payment information that is entered in the JD Edwards EnterpriseOne Accounts Payable system. This information includes open amounts for invoices, the payment status, and payment history information.

From the Self-Service - Supplier Payment Inquiry program (P04111), you can access the Self Service - Purchase Order Inquiry program (P4310SS) to review the purchase order that is associated with the payment.

Setting Up User-Defined Codes for Payment Inquiry

This section lists the user-defined codes that are required for payment inquiry.

A/P Self-Service Filter Option (04/SF)

This UDC defines the values in the View Voucher Status drop-down list that the system uses for payment inquiry.

This table lists hard-coded values:

Codes	Description 01
01:	All
02:	Open
03:	Paid
04:	Withheld

Self-Service A/P Sort Option (04/SO)

This UDC defines the values in the Sort By drop-down list that the system uses for payment inquiry and specifies the associated data item aliases in the query.

This table lists hard-coded values:

Codes	Description 01	Special Handling
01	None	
02	Invoice Date	DIVJ
03	Due Date	DDJ
04	Customer PO Number	PO

Codes	Description 01	Special Handling
05	Amount Open	AAP
06	Invoice Amount	AG

Setting Processing Options for Self-Service - Supplier Payment Inquiry (P04111)

You can access the processing options for Self-Service - Supplier Payment Inquiry (P04111) using the Work With Interactive Versions program (P983051).

Default

These processing options control the display of information in the Self-Service - Supplier Payment Inquiry program and the version of the Self Service - Purchase Order Inquiry program (P4310SS).

1. Default Filter Option
Specify which vouchers to display based on the pay status of the voucher. Values are:

01 or Blank: Display all vouchers, open or paid.

02: Display only open vouchers.

03: Display only paid vouchers.

04: Display vouchers for which withholding tax applies.

2. Default Sort Option
Enter a code to specify how vouchers are sorted. Values are:

01 or Blank: Do not sort; the vouchers appear in the order in which they are retrieved from the table.

02: Sort by invoice date.

03: Sort by voucher due date.

04: Sort by buyer purchase order number.

05: Sort by voucher open amount.

06: Sort by the amount of the original invoice.

3. Purchase Order Inquiry Self-Service Application Version
Specify the version of the Self Service - Purchase Order Inquiry program (P4310SS).

Setting Processing Options for Self Service - Purchase Order Inquiry (P4310SS)

You can access the processing options for Self Service - Purchase Order Inquiry (P4310SS) using the Work With Interactive Versions program (P983051).

Default

These processing options control the display of information in the Self Service - Purchase Order Inquiry program.

1. Order Header Filter Options

Enter a code to specify the filter to apply when displaying purchase orders. Values are:

00: Not specified.

01: All.

02: All purchase orders.

03: Open purchase orders.

04: Closed purchase orders.

05: Held purchase orders.

06: All blanket orders.

07: Open blanket orders.

08: Closed blanket orders.

09: Held blanket orders.

2. Order Detail Filter Options

Enter a code to specify how the system displays information on the View Order Detail form. Values are:

01: All lines.

02: Open lines.

03: Closed lines.

04: Held lines.

3. Order Header Sort Options

Enter a code to specify how the system sorts information on the View Order Header form. Values are:

01: Not specified.

02: Customer purchase order number.

03: Order date.

04: Requested date.

05: Promised date.

06: Order amount.

4. Order Detail Sort Options

Enter a code to specify how the system sorts information on the View Order Detail form. Values are:

01: Customer purchase order number.

02: Order date.

03: Promised date.

04: Requested date.

05: Quantity order.

06: Purchase order amount.

07: Agreement number.

Process

These processing options control the information that the system selects for display.

1. Purchasing Order Types (Required)

Specify the order types from UDC 00/DT that the system displays. If you need to enter multiple codes, enter them without punctuation or spaces. You must enter at least one order type in this processing option.

2. Include / Exclude (Future)

Specify a code to determine whether the system includes or excludes the purchase order type that you defined. Values are:

1: The system selects records whose order types do not match the purchase order type that you defined.

Blank: The system selects records whose order types match the purchase order type that you defined.

3. Blanket Order Types (Required)

Specify the order types from UDC 00/DT that the system displays. If you need to enter multiple order types, enter them without punctuation or spaces. You must enter at least one order type in this processing option.

4. Maximum Number of Matches

Specify the number of records that the system searches for and displays. Limiting the number of records that the system searches for and displays helps you to maximize system performance.

Display

These processing options control the display of information.

1. Display Header or Detail

Specify whether the system displays the View Order Header form or the View Order Detail form when users inquire on orders. Values are:

1: Display the View Order Header form.

Blank: Display the View Order Detail form.

2. Supplier Item X-Reference

Specify the code by which the system searches for and displays cross-reference information when using a customer item number. Cross-references associate your internal item numbers with the customer's item numbers. You set up items in the Item Master Information table (F4104) and create the cross-reference information in the Item Cross

Reference Revisions program (P4104). You must specify a value that has been set up in user defined code table 41/DT. If you leave this processing option blank, the system does not display cross-reference information.

3. Type Code

Specify the type code of the Who's Who attention name that appears in the mailing address. You must enter a code that has been set up in user defined code table 01/W0. If you leave this processing option blank, the system does not display the attention name line in the mailing address.

Versions

These processing options enable you to specify versions of the programs that are called by the Self Service - Purchase Order Inquiry program (P4310SS).

1. Self Service - Display Payments (P04111)

Specify the version of the Self-Service - Display Payments program (P04111) the system uses to display payment information. If you leave this processing option blank, the system uses version ZJDE0001.

2. Self Service - Manage Purchase Order (P4311S)

Specify the version of the Self-Service - Manage Purchase Orders program (P04312S) that the system uses to modify purchase order information. If you leave this processing option blank, the system uses version ZJDE0001.

3. Self Service - Manage Purchase Order Receipt (P4312S)

Specify the version of Self-Service - Manage Purchase Orders Receipt program (P4312S) that the system uses to modify purchase orders receipt information. If you leave this processing option blank, the system uses version ZJDE0001.

Setting Up Supplier Release Scheduling

This section provides an overview of supplier release schedules, lists a prerequisite, and discusses how to:

- Set processing options for Supplier Schedule Revisions (P34301).
- Set processing options for Adhoc Schedule Revisions (P34302).

Understanding Supplier Release Schedules

Suppliers can use the SRM portlet to review planned and released supplier schedules. The schedule provides suppliers with advance notice of requirements and helps suppliers to forecast customer (also known as buyer or planner) needs for the future.

Suppliers can inquire about a particular item or blanket order that is associated with a supplier schedule. The buyer can allow the supplier to change delivery dates and quantities on the supplier schedule, provided that the buyer's enterprise has set the appropriate processing option in the Supplier Schedule Revisions program (P34301) to allow the supplier to make changes. After the supplier submits changes to the supplier schedule, the system automatically notifies the buyer of the changes that the supplier has made.

Prerequisite

Verify that the order type for kanban orders exists in UDC table 43/OT (Self Service Order Types).

See *Setting Up Common User-Defined Codes for Supplier Self-Service and Buyer Workspace*.

Setting Processing Options for Supplier Schedule Revisions (P34301)

These processing options enable you to configure the Supplier Schedule Revisions program for self-service.

Versions

You use these processing options to specify versions of other programs that are called by the Supplier Schedule Revisions program.

1. Open Order Inquiry (P4310)

Specify the version of the Open Order Inquiry program (P4310) to inquire on open orders. If you leave this processing option blank, the system uses version ZJDE0001.

2. Supply/Demand Inquiry (P4021)

Specify the version of the Supply/Demand Inquiry program (P4021) to use. If you leave this processing option blank, the system uses version ZJDE0001.

3. Purchase Order Entry (P4310)

Specify the version of the Purchase Order Entry program (P4310) to use. If you leave this processing option blank, the system uses version ZJDE0001.

4. Vendor/Blanket Information (P4321)

Specify the version of the Vendor/Blanket Information program (P4321) that you want to use. If you leave this processing option blank, the system uses version ZJDE0001.

5. Pegging Information (P3412)

Specify the version of the Pegging Information program (P3412) that you want to use. If you leave this processing option blank, the system uses version ZJDE0001.

6. Supplier Schedule Release Generation (R34410)

Specify the version of the Supplier Schedule Release Generation program (R34410) that you want to use. If you leave this processing option blank, the system uses version ZJDE0001.

7. Item Branch (P41026B)

Specify the version of the Item Branch program (P41026B) to use. If you leave this processing option blank, the system uses version ZJDE0001.

8. Enter the version of Supply/Demand Inclusion Rules to use for active Blanket Order selection

Specify a value from UDC 40/RV that identifies an inclusion rule to use for this branch/plant. The JD Edwards EnterpriseOne Manufacturing and Warehouse Management systems use inclusion rules. For Manufacturing, inclusion rules enable multiple versions of resource rules for running MPS, MRP, or DRP. For Warehouse Management, inclusion rules enable multiple versions of inclusion rules for running putaway and picking. The system processes only those order lines that match the inclusion rule for a specified branch/plant.

9. Purchase Order Inquiry Self Service (P4310SS)

Specify the version of the Purchase Order Inquiry Self Service program (P4310SS) to use. If you leave this processing option blank, the system uses version ZJDE0001.

Defaults

These processing options affect the functioning of the Supplier Schedule Revisions program.

1. Enter the Document Type to filter on the form

Specify the document type from UDC 00/DT to select documents to display.

2. Supplier Self Service Functionality

Enter **1** to use the program with the Collaborative Portal.

3. Enter Cross Reference Type for Supplier Item Number (used only in web mode)

Specify the code to search cross-reference information using a supplier item number. Cross-references associate your internal item numbers with the supplier's item numbers. You can set up items in the Item Master Information table (F4101) and create the cross-reference information in the Item Cross Reference Revisions program (P4104). You must enter a value that has been set up in UDC 41/DT. If you leave this processing option blank, the system does not display or process any cross-reference information.

4. Allow changes to the schedule

Enter **1** to prevent changes to the schedule or leave this processing option blank to allow changes to the schedule. This processing option is operational only when you access this program through the Collaborative Portal.

Status Update

You use these options to control whether a supplier schedule can be updated based on its status as well as the status to apply to updated supplier schedules.

Vendor Schedule Status

Specify the status from UDC 40/SS to apply to supplier schedules that are changed by the supplier.

To Status

Specify the status from UDC 40/SS beyond which changes cannot be made to the supplier schedule. If you leave this processing option blank, the schedule is always open to change.

Setting Processing Options for Adhoc Schedule Revisions (P34302)

These processing options enable you to configure the Adhoc Schedule Revisions program for self-service.

Defaults

You use these processing options to control the display of supplier item cross reference information and to control whether users can change ad hoc schedules.

1. Enter Cross Reference Type for Supplier Item Number

Specify the code to search cross-reference information using a supplier item number. Cross-references associate your internal item numbers with the supplier's item numbers. You can set up items in the Item Master Information table (F4101) and create the cross-reference information in the Item Cross Reference Revisions program (P4104). You must enter a value that has been set up in UDC 41/DT. If you leave this processing option blank, the system does not display or process any cross-reference information.

2. Allow changes to the schedule

Enter **1** to prevent changes to the schedule or leave this processing option blank to allow changes to the schedule. This processing option is operational only when you access this program through the Collaborative Portal.

3 Configuring the SRM Portlet Using the Configuration Wizard

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 configuration.

Note:

- *JD Edwards EnterpriseOne Tools Runtime Administration Guide , "Setting Up Viewable and Configurable Portlets"* .

Note: Configuration Wizard is discussed indetail below, in the section "Understanding the Configuration Wizard".

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). The portlet displays only those alerts which you have configured.

Note:

- *Installation Steps for the JD Edwards EnterpriseOne Collaborative Portal*in the *JD Edwards EnterpriseOne Applications Buyer Workspace and Supplier Self Service Implementation Guide* .

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.

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.

Understanding the Configuration 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 need to configure each portlet instance only 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.

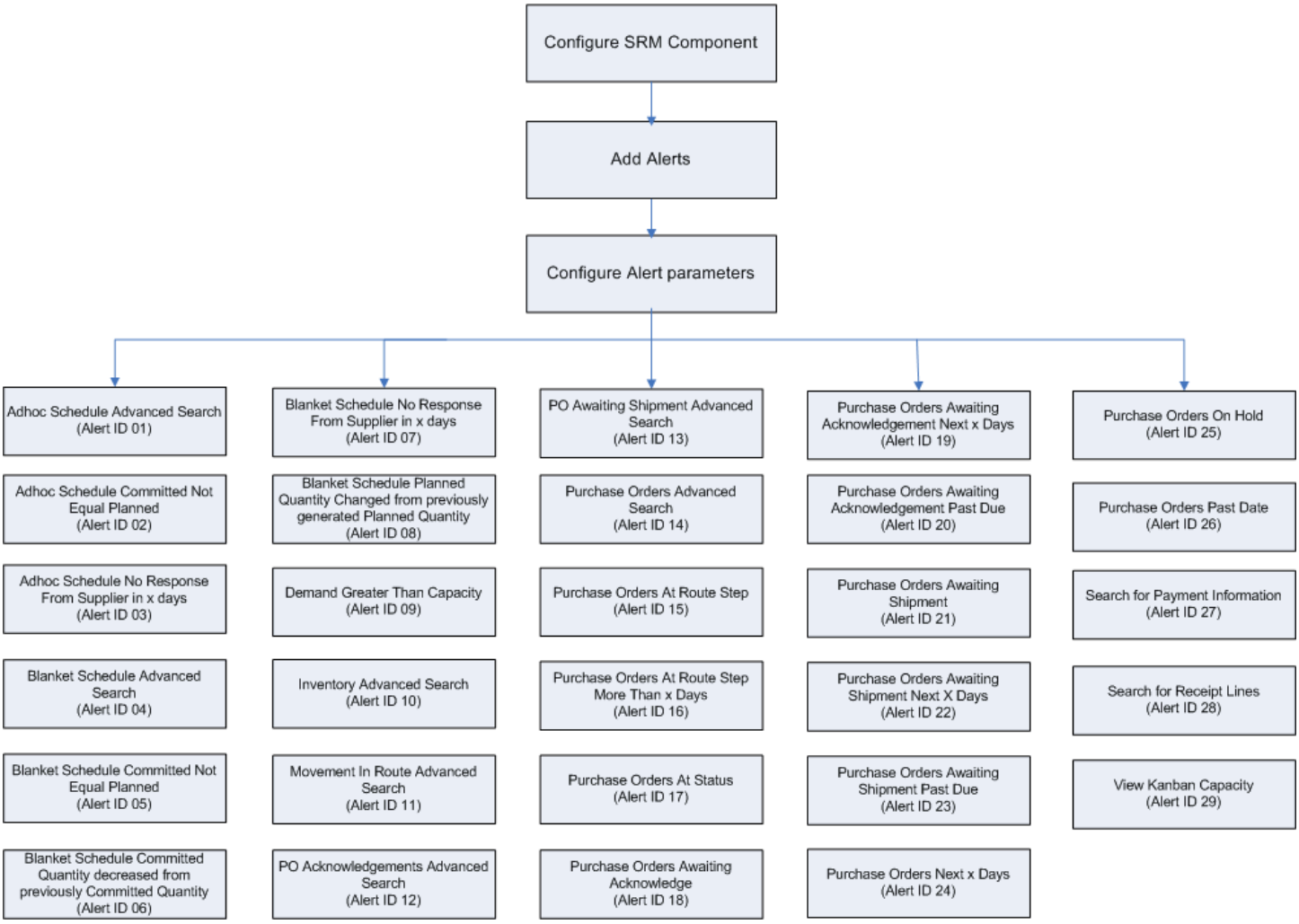
The Alerts Master table (F43S001) stores the list of alerts currently available in the Supplier Self-Service portal. You can use the JD Edwards EnterpriseOne row security feature to apply data security to this table. Data security is based on the user ID which enables you to view and configure only those 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.

Note:

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

This flowchart illustrates the process for configuring alerts.


Configure SRM Component
Add Alerts
Configure Alert parameters
Adhoc Schedule Advanced Search (Alert ID 01)
Adhoc Schedule Committed Not Equal Planned (Alert ID 02)
Adhoc Schedule No Response From Supplier in x days (Alert ID 03)
Blanket Schedule Advanced Search (Alert ID 04)
Blanket Schedule Committed Not Equal Planned (Alert ID 05)
Blanket Schedule Committed Quantity decreased from previously Committed Quantity (Alert ID 06)
Blanket Schedule No Response From Supplier in x days (Alert ID 07)
Blanket Schedule Planned Quantity Changed from previously generated Planned Quantity (Alert ID 08)
Demand Greater Than Capacity (Alert ID 09)
Inventory Advanced Search (Alert ID 10)
Movement In Route Advanced Search (Alert ID 11)
PO Acknowledgements Advanced Search (Alert ID 12)
PO Awaiting Shipment Advanced Search (Alert ID 13)
Purchase Orders Advanced Search (Alert ID 14)
Purchase Orders At Route Step (Alert ID 15)
Purchase Orders At Route Step More Than x Days (Alert ID 16)
Purchase Orders At Status (Alert ID 17)
Purchase Orders Awaiting Acknowledge (Alert ID 18)
Purchase Orders Awaiting Acknowledgement Next x Days (Alert ID 19)
Purchase Orders Awaiting Acknowledgement Past Due (Alert ID 20)
Purchase Orders Awaiting Shipment (Alert ID 21)
Purchase Orders Awaiting Shipment Next X Days (Alert ID 22)
Purchase Orders Awaiting Shipment Past Due (Alert ID 23)
Purchase Orders Next x Days (Alert ID 24)
Purchase Orders On Hold (Alert ID 25)
Purchase Orders Past Date (Alert ID 26)
Search for Payment Information (Alert ID 27)
Search for Receipt Lines (Alert ID 28)
View Kanban Capacity (Alert ID 29)

Forms 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.

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.

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.

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.

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

4. Click the Save/Next button.
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.

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.

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
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

Available Alerts	Alert ID	Associated Program	Initial Form Displayed
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.

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.

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

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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

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.

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.

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.

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.

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.

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.

Copying Alert Configuration From Supplier to Supplier (Release 9.2 Update)

This section discusses how to copy the configured alerts from one supplier to another. This is a quick way for you to get the configuration of alerts copied from one supplier to as many suppliers as it applies.

Setting Up the Record for Copying the Alert Configurations

You use the Copy Alert Configuration Work File program (P43S003W) to set up the record to copy the alert configurations that have been set up for a supplier, to other suppliers. The system stores these records in the Copy Alert Work File table (F43S003W).

Use the From User ID field on the Work with Copy Alert Work File form to enter the user ID from which you want to copy the alert configurations, and the To User ID field to enter the user ID to which you want to copy the alert configurations.

If the Hide Copied Alerts checkbox on the Work with Copy Alert Work File form is checked, the system hides the records that are already copied. To review the copied records, you should clear the checkbox.

Forms Used to Set Up Record for Copying Alert Configuration Work File

Form Name	FormID	Navigation	Usage
Work With Copy Alert Work File	W43S003WA	Enter P43S003W in the Fast Path.	Review the copied alert configuration workfile records. You can also use this form to delete the exisiting workfile records.
Copy Alert Work File Revisions	W43S003WB	Click Add on the Work With Copy Alert Work file form.	Specify the From User ID and the To User ID of the suppliers from and to which you want to copy the alert configurations, respectively. You can also use this form to update and delete the existing records.

Setting Up Processing Options for the Copy Alert Configuration Work File Program (P43S003W)

Use these processing options to specify the default user ID and the version of the R43S003C UBE.

Default

From User ID
Use this processing option to specify the default From User ID that appears on the Copy Alert Work File Revisions form in the Copy Alert Configuration Work File program.

Versions

Copy Alerts Configuration (R43S003C)
Use this processing option to identify the version of the Copy Alert Configuration program (R43S003C) that the system uses to copy the alert configurations.

Copying Alert Configuration

After setting up the record in the Copy Alert Work File Revisions program (P43S003W), run the Copy Alert Configurations (R43S003C) UBE.

When you run the UBE in final mode, it updates the configuration in the Alerts Configuration table (F43S002), which stores the alerts configuration of the users.

This UBE copies the alerts that have a blank status in the Alerts Copy Status field of the F43S003W table. Based on the processing option setting, if the system does not delete the records after the UBE is run, it updates the Alerts Copy Status field to 1. When you run this UBE subsequently, the system does not pick the configurations that have the the Alerts Copy Status as 1.

Running the Copy Alerts Configuration Program

Select Copy Alerts from the Form menu on the Copy Alert Work File Revisions form.

Alternately, run the report using Batch Versions via the Fast Path.

Setting Up Processing Options for the Copy Alerts Configuration Program (R43S003C)

Use these processing options to supply the default values to run the Copy Alerts Configuration program.

Process

1. Proof or Final Mode

Use this processing option to specify whether the system runs the program in proof or final mode.

Valid values are:

Blank: Run in proof mode.

1: Run in final mode.

Note: The system updates the F43S002 table only when you run the report in final mode.

2. Delete Work File Records
Use this processing option to specify whether the system deletes the processed records from the Copy Alerts Work File (F43S003W) after the report is run in final mode. Values are:
Blank: Do not delete the processed records.

1: Delete the processed records.

4 Processing the Procurement Cycle

Understanding the Procurement Cycle

This table lists the major steps of a typical procurement cycle and the user who performs each step:

Step	User
Purchase order creation and dispatch.	Buyer
Purchase order acknowledgement	Supplier
Purchase order acknowledgement change approvals.	Buyer
Purchase order shipment notification (status update or receipt routing).	Supplier
Movement in route.	Supplier or third-party
Purchase order receipt creation.	Buyer **Note:** The supplier can review the purchase order receipt.
Voucher creation.	Buyer **Note:** The supplier can review the voucher information.
Payment creation.	Buyer **Note:** The supplier can review the payment information.

With the exception of purchase order creation and voucher creation, the SRM portlet exposes these transactions.

Acknowledging Purchase Orders

This section provides an overview of purchase order acknowledgement and discusses how to:

- Review purchase orders awaiting acknowledgement.
- Submit purchase order acknowledgements.
- Split purchase order lines.

- Approve supplier changes.

Understanding Purchase Order Acknowledgment

When a buyer creates a purchase order in JD Edwards EnterpriseOne, the supplier for whom the purchase order was entered can use the SRM portlet to view the purchase order.

The supplier can acknowledge the purchase order without changes. In this situation, the system updates the purchase order line status to an acknowledged status in accordance with the order activity rules.

The supplier can also change the date, quantity, and unit price and then acknowledge the purchase order. If the quantity is short-supplied, the supplier can cancel the remaining quantity. If the supplier changes the date, quantity, or unit price, the system validates the changes against the tolerance rules and initiates a purchase order change approval workflow if the purchase order is out of tolerance.

If the supplier needs to indicate delivery over multiple dates, the supplier can split purchase order lines.

> **Note:** The buyer can perform purchase order acknowledgment, including modifying or splitting the purchase order, on behalf of the supplier. If the buyer makes a change that exceeds the tolerance rules, the purchase order is routed through the approval process just as it would be if the supplier had done the acknowledgment.

Split Lines

You split lines if an order line is going to be split across multiple deliveries. When you acknowledge split lines, the system creates multiple order lines that are tracked individually from that time forward.

When assessing the tolerances for split lines, the system does not check the quantity individually on each line. Instead, the system sums the quantity from all of the split lines and validates the total against the original quantity.

The system assesses the price and date at the split line level.

Acknowledgement Change Approval

If the supplier makes changes to a purchase order that exceed the tolerance, the system sends a workflow message to the buyer's work center. The Acknowledgement Approval queue in the work center contains all of the orders that have failed the tolerance test and are waiting for the buyer to review and approve them.

The workflow message contains a link that enables the buyer to launch the Approve Purchase Order page in the Collaborative Portal. From this page, the buyer can approve or reject the supplier's changes. The buyer can also attach a text note or attachment that is included in the approval or rejection message that is sent back to the supplier.

When the buyer clicks either Approve or Reject on the Approve Purchase Order page, the system sends a workflow message to the supplier in either the Acknowledgement Approved or Acknowledgement Rejected work center queue.

Forms Used to Acknowledge Purchase Orders

Form Name	Form ID	Navigation	Usage
Search for Orders to Acknowledge	W43S01D	Select the PO Acknowledgements Advanced Search task.	Locate purchase orders that are waiting for supplier acknowledgement.

Form Name	Form ID	Navigation	Usage
View Order Header Information	W43S01G	Select the Purchase Orders Awaiting Acknowledge alert. Select the Purchase Orders Awaiting Acknowledgement Next x Days alert. Select Purchase Orders Awaiting Acknowledgement Past Due alert.	The supplier can use this page to review purchase orders that are awaiting acknowledgement.
Acknowledge Orders	W43S01B	Click Find on the Search for Orders to Acknowledge page. Click an order number on the View Order Header Information page.	Acknowledge purchase orders with or without changes.
Search for Orders to Acknowledge	W43S01D	Click the Search link on the Acknowledge Orders page.	Search for purchase orders to acknowledge that are not already listed on the Acknowledge Orders page. When you click Find on the Search for Orders to Acknowledge page, the system loads the purchase orders that are retrieved in the search on the Acknowledge Orders page.
Edit Order to Acknowledge	W43S01C	Click the Edit link on the Acknowledge Orders page.	Add an attachment to the purchase order or revise the following purchase order information: • Supplier sales order number. • Quantity. • Unit purchase price. • Delivery date. • Shipment date. • Payment terms. • Carrier. • Lot number.
Split and Acknowledge PO Lines	W43S01E	Click the Split Lines link on the Acknowledge Orders page.	Specify different delivery dates for specific quantities.
Approve Purchase Order	W43181A	Access the Changes Need To Be Approved message in the	Approve or reject the changes that exceed

Form Name	Form ID	Navigation	Usage
		work center, click the button to access the detailed media object for the message, and then click the Purchase Order Approval link.	tolerance that a supplier has made to a purchase order.

Reviewing Purchase Orders Awaiting Acknowledgement

Access the View Order Header Information page.

Submit Purchase Order Acknowledgements

Access the Acknowledge Orders page.

Edit
Click this link to access the Edit Order to Acknowledge page.

Split Line
Click this link to access the Split and Acknowledge PO Lines page.

Quantity
Specify the quantity of the item that you plan to deliver.

Cancel Remaining
Select this option if you are unable to deliver the complete order. The system cancels difference between the original quantity and the quantity you have specified in the Quantity field.

Delivery Date
Specify the date that you expect to deliver the item.

Select
Select this option for the lines that you want to acknowledge

Acknowledge
Click this button to acknowledge the purchase order.

The system acknowledges only those lines for which you have selected the Select check box.

If you have made changes to the quantity or delivery date, the system validates your changes against the tolerance rules and initiates the PO Change Approval workflow if your changes exceed the tolerance.

Splitting Purchase Order Lines

Access the Split and Acknowledge PO Lines page.

Quantity
Specify the quantity that you will deliver on a delivery date.

When you press tab after entering a quantity in this field, the system creates a new line on which you can specify the quantity for another delivery date. The total in the Quantity field for all lines must be greater than or equal to the order quantity.

Unit Purchase Price
Specify the unit cost of one item, as purchased from the supplier, excluding freight, taxes, discounts, and other factors that might modify the actual unit cost.

Delivery Date
Specify the delivery date for the quantities that are listed on each line.

Shipment Dates
Specify the shipment date for the quantities that are listed on each line.

Select
Select this option for the lines that you want to acknowledge

Acknowledge
Click this button to acknowledge the purchase order after you have split the lines and specified the appropriate delivery and shipment dates.

The system acknowledges only those lines for which you have selected the Select check box.

Approving Supplier Changes

Access the Approve Purchase Order page.

Approve
Click this button to move the purchase order to an approved status and to route a message to the supplier to notify the supplier that you have approved the supplier's changes to the purchase order.

Reject
Click this button to move the purchase order to a rejected status and to route a message to the supplier to notify the supplier that you have rejected the supplier's changes to the purchase order.

Processing Shipment Notifications and Receipt Routing

This section provides an overview of shipment notifications and receipt routing and discusses how to:

- Send a shipment notification.
- Revise shipment details.
- Advance the routing of a shipment.
- Edit movement details.

Understanding Shipment Notifications and Receipt Routing

The supplier can notify the buyer of a shipment in one of two ways:

- The supplier can update the purchase order line status to indicate that the items on the line are in transit.

- The supplier can move shipments into routing.

  The supplier can specify the quantity, lot information, and a shipment identifier. Suppliers can also cancel any remaining quantity on the order.

The system either updates the purchase order line status or moves the shipment into routing, depending on how the processing options are set for the Self-Service - Purchase Order Receipts program (P4312S).

Note: You can set up a version of the Self-Service - Purchase Order Receipts program to enable the buyer to perform purchase order acknowledgements on behalf of the supplier so that the system updates the status to approved, bypassing the purchase order approval process that results if the buyer makes changes to the purchase order that exceed the tolerance.

Movement in Route

Suppliers and third-party service providers can use the Supplier Relationship Management (SRM) portlet to move receipted purchases through various routing steps.

The Self-Service - Movement in Routing program (P43250SS) enables suppliers and third-party service provides to move a shipment to the next route operation, as well as to specify quantity and lot information.

Forms Used to Process Shipment Notifications and Receipt Routing

Form Name	FormID	Navigation	Usage
Search for Order Lines to Notify	W4312SH	Select the PO Awaiting Shipment Advanced Search task.	Search for purchase orders that are awaiting shipment.
View Orders to Ship	W4312SB	Select the Purchase Orders Awaiting Shipment alert. Select the Purchase Orders Awaiting Shipment Next x Days alert. Select the Purchase Orders Awaiting Shipment Past Due alert.	Access purchase orders that are awaiting shipment to send a shipment notification.
Notify Order Shipment	W4312SF	Click the Find link on the Search for Order Lines to Notify page. Click the order number link on the View Orders to Ship page.	Notify the buyer of a shipment. **Note:** Whether the shipment notification results only in a status update or results in moving the receipt into routing depends on the how the processing options are set for the version of the Self-Service - Purchase Order Receipts

Form Name	FormID	Navigation	Usage
			program (P4312S) that you are using.
Edit Line Item Detail	W4312SG	Click an EDIT link on the Orders Awaiting Shipment page.	Specify the shipment identifier, quantity to ship, country of origin and shipment date.
View Orders on Route	W43250SSA	Select the Purchase Orders At Route Step alert. Select the Purchase Orders At Route Step More Than x Days alert.	Access shipments that are at a specific route step to advance the routing of the shipment.
Move Line Items on Route	W43250SSD	Select the Movement In Route Advanced Search task.	Move a shipment to the next route operation and specify quantity and lot information.
Edit Line Item Detail	W43250SSE	Click an Edit link on the Move Line Items on Route page.	Update the movement details, as well as lot information. This system passes this information to the receipt process if the next step moves the quantity into stock.

Sending a Shipment Notification

Access the Notify Order Shipment page.

To notify the buyer of a shipment:

1. Click the EDIT link to revise the shipment details if necessary and to specify a shipment date.
2. Select the Select check box for the purchase order lines that you have shipped.
3. Click Notify.
4. Click OK on the shipment confirmation message.

   If you have entered a shipment identifier in the Shipment Identifier field on this page, the system applies that shipment identifier to all selected lines when you click Notify.

Revising Shipment Details

Access the Edit Line Item Detail page.

Shipment Identifier
Specify the code on the container or that you assign to the container in which the items on this purchase order or order line are shipped.

Advancing the Routing of a Shipment

Access the Move Line Items on Route page.

To advance the routing of a shipment:

1. Click the Edit link to revise the movement details if necessary.
2. Select the Select check box for the shipment.
3. Click Move In Route.
4. Click OK on the shipment confirmation message.

To Oper (to operation)
Specify the routing operation or step to which to move the items.

Editing Movement Details

Access the Edit Line Item Detail page.

To Operation
Specify the routing operation or step to which to move the items.

Move Quantity
Specify the number of units that have been either moved or dispositioned.

Location
Specify the storage location from which goods are moved.

Lot/SN (lot/serial number)
Enter a number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.

Lot Expiration Date
Specify the date on which a lot of items expires.

Reviewing Inventory Information

This section provides an overview of the review of inventory information and lists the pages to review inventory information.

Understanding the Review of Inventory Information

The Self-Service - Inventory Information Inquiry program (P41204) enables suppliers to review inventory levels for items that are relevant to them.

Forms Used to Review Inventory Information

Form Name	FormID	Navigation	Usage
Search for Inventory Information	W41204A	Select the Inventory Advanced Search task.	Locate inventory information that is relevant to the supplier who is using the portlet.
View Inventory Information	W41204B	Click Find on the Search for Inventory Information form.	Review inventory information.
View Inventory Detail	W41204D	Click the View link in the Additional Information column on the View Inventory Information page.	Review detailed inventory information.

Reviewing Purchase Order Information

This section provides an overview of the review of purchase order information and lists the pages to review order information.

Understanding the Review Purchase Order Information

The SRM - PO Inquiry program (P43S05) enables you to inquire on orders at different status levels, such as awaiting acknowledgement, purchase order approvals, and awaiting shipment. This application is the central resource that integrates order information into one view. For example, if the order is at the awaiting acknowledgement status, clicking the status link takes the user to the acknowledgement application.

Forms Used to Review Order Information

Form Name	FormID	Navigation	Usage
Search for Orders	W43S05C	Select the Purchase Orders Advanced Search task.	Locate purchase orders for the supplier who is using the portlet.
View Order Detail Status	W43S05A	Select the Purchase Orders At Status alert. Select the Purchase Orders Next x Days alert.	Review purchase order information.

Form Name	FormID	Navigation	Usage
		Select the Purchase Orders On Hold alert. Select the Purchase Orders Past Date alert. Click Find on the Search for Orders page.	
View Order Detail Line Information	W43S05B	Click a line number link on the View Order Detail Status page.	Review detailed information for a specific purchase order.

Reviewing Receipt Information

This section provides an overview of the review of receipt information and lists the pages to review receipt information.

Understanding the Review of Receipt Information

The SRM - Receipt Inquiry program (P43121SS) enables you to inquire on orders that have been received. This application is the central resource that integrates receipt information into one view. If the order in a receipt route, you can click the quantity in route link to access the movement in routing application where you can update the route step. If a voucher has been created for the order, you can click the vouchered link to go to the payment information application.

Forms Used to Review Receipt Information

Form Name	FormID	Navigation	Usage
Search for Receipts	W43121SSC	Select the Search for Receipt Lines task.	Locate receipt records.
View Receipt Detail Status	W43121SSA	Click Find on the Search for Receipt page.	Access receipt information.
View Receipt Line Information	W43121SSB	Click a line number link on the View Receipt Detail Status page.	Review detailed information about a receipt. The data on this page is for review only.

Reviewing Payment Information

This section provides an overview of the review of payment information and lists the pages to review payment information.

Understanding the Review of Payment Information

The Self-Service - Supplier Payment Inquiry program (P04111) enables a supplier to inquire on the payment information that is relevant to that supplier. This application is the central resource that integrates payment information into one view. You can click the invoice number link to access detailed payment information. You can click the order number link to access purchase order inquiry. You can click the payment status link to view the payment history.

Forms Used to Review Payment Information

Form Name	FormID	Navigation	Usage
Advanced Search	W04111B	Select the Search for Payment Information task.	Locate payment records.
View Payment Information	W04111A	Click Find on the Advanced Search page.	Review information about multiple payments.
View Payment Information Detail	W04111C	Click an invoice number link on the View Payment Information page.	Reviewed detailed information about a specific payment.
View Payment History	W04111E	Click the View Payment History link on the View Payment Information Detail page. Click the payment status link on the View Payment Information page.	Review the payment history for a specific invoice.
View Order Detail	W4310SSB	Click an order number link on the View Payment Information page.	Review information about the purchase orders that are associated with the payment.
View Item Detail	W4310SSF	Click a line item link on the View Order Detail page.	Review detailed information about a purchase order line item.
View Receipt Lines	W4310SSC	Click a quantity received link on the View Order Detail page.	Review information about the receipts that are associated with the payment.

Form Name	FormID	Navigation	Usage
View Receipt Line Detail	W4310SSG	Click a line number link on the View Receipt Lines page.	Review detailed information about a receipt.

5 Managing the Lean Procurement Process in the SRM Portlet

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.

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.

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*.

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.

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.

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.

Forms Used to Process Supplier Release Schedules within the SRM Portlet

Form Name	Form ID	Navigation	Usage
Search For Schedule	W34301A	Select the Blanket Schedule Advanced Search task.	Locate supplier schedules.
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.	Review ad hoc schedules.

Form Name	Form ID	Navigation	Usage
		Select the AdHoc Schedule No Response From Supplier in x days alert.	
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.

Revising Quantities for a Blanket Schedule

Access the Edit Supplier Schedule page.

Adding an Ad Hoc Schedule

Access the Add Ad Hoc Schedules page.

Revising Quantities for an Ad Hoc Schedule

Access the Edit Ad Hoc Schedules page.

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.

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.
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.

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.

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.

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.

Forms Used to Review Kanban Capacity in the SRM Portlet

Form Name	Form ID	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.

6 Appendix A - Self-Service Programs

Self-Service Programs

This appendix provides an overview of supplier self-service programs and discusses how to set processing options for supplier self-service programs.

Understanding Supplier Self-Service Programs

The supplier self-service portlets, which were delivered in previous releases of JD Edwards EnterpriseOne, are available for your use, though they function somewhat differently from the SRM portlet.

The following table lists the supplier self-service portlets and their associated applications:

Supplier Self-Service Portlet	Associated Application
SSS Quote Status	Self Service Quote Response Entry (P4334SS)
SSS Search	Self-Service - Supplier Payment Inquiry (P04111)
SSS Supplier Alerts	Self Service - Purchase Order Inquiry (P4310SS)
SSS Supplier Order Status	Self Service - Purchase Order Inquiry (P4310SS)
SSS Supplier Performance	Self-Service Supplier Analysis Summary (P43230SA)
SSS Tasks	Self Service - Update Address Book Record (P01012SS)

Setting Processing Options for Supplier Self-Service Programs

This section discusses how to set processing options for:

- Self Service Quote Response Entry (P4334SS).
- Self-Service Supplier Analysis Summary (P43230SA).

Note: The Self-Service - Supplier Payment Inquiry program (P04111) and the Self Service - Purchase Order Inquiry program (P4310SS) are used by the SRM portlet, so the processing options for those programs are documented in the setup chapter for that portlet. Also, the Self Service - Update Address Book Record program (P01012SS) is documented in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide* .

Setting Processing Options for Self Service Quote Response Entry (P4334SS)

Use these processing options to supply the default values for the Self Service Quote Response Entry program.

Defaults

These processing options specify the default values that the system uses for searching and sorting quote information.

1. Refine Search Quote Display (Required)
Specify the default search criteria for the Refine Quote Search option. Values are:

01: Search all quotes.

02: Search open quotes only.

03: Search closed quotes only.

04: Search quotes for which there has been no response.

2. Refine Sort Quote Display (Required)
Specify the default sort criteria for the refine quote sort option. Values are:

01: Sort by Quantity

02: Sort by Response Required Date

03: Sort by Quote Entered Date

04: Sort by Responded Date

05: Sort by Quote Number

3. Refine Sort Quote Price History Display (Required)
Specify the default sort option for Quote Price History display. Values are:

01: Sort by Quantity

02: Sort by Quoted Price

03: Sort by Promised Delivery Date

04: Sort by Expiration Date

Display

These processing options specify codes that the system uses for displaying quote information.

1. Supplier Item Cross-Reference Type code (Optional)
Specify the cross-reference type code for supplier's item. The cross-reference type codes can be found in UDC 41/DT.

2. Date type for Advanced Search query (Required)
Specify the default date type for the Advanced Search form. The specified date type will be selected with the radio button. Values are:

1: Response Required Date

2: Quote Entered Date

3: Responded Date

3. Closed Status Code (Required)

Specify the Closed Status Code. All higher statuses are also consider closed. Enter a status code from UDC 40/AT.

4. Type Code (Required)
Specify the Type Code to display the supplier's Ship To address. Enter a type code from UDC 01/W0.

Process

These processing options specify default-processing information.

1. Order Type (Required)
Specify the Document Type for the quotes. Enter a document type from UDC 00/DT.

2. Default Number of Days (Required)
Specify the number of days to calculate the From date for Advanced Search. The system subtracts the number of days specified from today's date to determine the From date.

3. Maximum Records to Query (Required)
Specify the number of records to query and display. Use this processing option wisely to maximize system performance.

Setting Processing Options for Self-Service Supplier Analysis Summary (P43230SA)

Use these processing options to supply the default values for the Self-Service Supplier Analysis Summary program.

Display

These processing options specify the default values that the system uses for displaying information.

1. Default Performance Analysis View (Required)
Specify the default view for performance analysis display. If you leave this processing option blank, the quality analysis view is used. Values are:

1: Quality analysis.

2: Delivery analysis.

3: Cost analysis.

2. Costing Method (Required)
Specify the specific costing method (01 - 08) to be displayed as the inventory cost. If you leave this processing option blank, costing method 08 is used.

3. Cost comparison for Variance Information (Required)
Specify the cost type that must be compared against the paid cost for variance information. If you leave this processing blank, ordered cost is used. Values are:

1: Inventory cost.

2: Ordered cost.

3: Receipt cost.

Process

These processing options specify how the system displays information.

1. Supplier Item Cross-Reference Type Code
Specify the cross-reference type code to be used for displaying supplier item number. If you leave this processing option blank, the JD Edwards EnterpriseOne internal item number is displayed.

2. Default Unit of Measure (Required)
Specify the unit of measure for displaying quantities. If you leave this processing option blank, EA (each) is used.

3. Cost Analysis Format Name (Required)
Specify the format name for cost analysis. Based on this format name, the Key Performance Indicators for cost analysis are retrieved from the Inquiry Formats table (F5193).

4. Delivery Analysis Format Name (Required)
Specify the format name for delivery analysis. Based on this format name, the Key Performance Indicators for delivery analysis are retrieved from the Inquiry Formats table (F5193).

5. Quality Analysis Format Name (Required)
Specify the format name for quality analysis. Based on this format name, the Key Performance Indicators for quality analysis are retrieved from the Inquiry Formats table (F5193).

Default

This processing option is used to calculate the "from" month for display.

1. Default "From" month from today's month
Specify the default "from" month for the View Performance Summary page. The number entered here is subtracted from the current month to calculate the "from" month.

Delivery

These processing options control whether good and bad performances are highlighted

The following term applies to all of the processing options on the Delivery tab.

Highlight Column
Specify whether you want the first column to be highlighted. If you want this column to be highlighted then you must specify the From and To values for both the Good and Bad performances. If you leave this processing option blank, 0 is used. Values are:

Blank: Do not highlight good and bad performances.

1: Highlight good and bad performances.

Column heading are retrieved from the Inquiry Formats table (F5193). Good performances are highlighted in green and bad performances are highlighted in red.

Quality

These processing options control whether good and bad performances are highlighted

The following term applies to all of the processing options on the Delivery tab.

Highlight Column
Specify whether you want the first column to be highlighted. If you want this column to be highlighted then you must specify the From and To values for both the Good and Bad performances. If you leave this processing option blank, 0 is used. Values are:

Blank: Do not highlight good and bad performances.

1: Highlight good and bad performances.

Column heading are retrieved from the Inquiry Formats table (F5193). Good performances are highlighted in green and bad performances are highlighted in red.

Cost

These processing options control whether good and bad performances are highlighted

The following term applies to all of the processing options on the Delivery tab.

Highlight Column

Specify whether you want the first column to be highlighted. If you want this column to be highlighted then you must specify the From and To values for both the Good and Bad performances. If you leave this processing option blank, 0 is used. Values are:

Blank: Do not highlight good and bad performances.

1: Highlight good and bad performances.

Column heading are retrieved from the Inquiry Formats table (F5193). Good performances are highlighted in green and bad performances are highlighted in red.

Index

A

A/P self-service filter option (04/SF) *35*
acknowledge header sort option (43/AH) *10*
Acknowledge Orders page *67*, *68*
acknowledgement change approval *66*
acknowledgement detail sort op (43/AQ) *11*
acknowledgment of purchase orders
    performing *66*
    setting up *6*
ad hoc schedules
    creating *80*
    overview *78*
    revising quantities *80*
Add Ad Hoc Schedules page *80*, *80*
Address Parent/Child Revisions form *9*, *17*
AdHoc Schedule Advanced Search task
    associated program *48*
AdHoc Schedule Committed Not Equal Planned alert
    associated program *48*
AdHoc Schedule No Response From Supplier in x days alert
    associated program *48*
Adhoc Schedule Revisions (P34302)
    overview *78*
    processing options *41*
Advanced Search page *75*
alerts
    adding parameters *50*
    associated programs *47*
approval of purchase orders
    overview *66*
    performing *69*
    setting up *8*
Approve Purchase Order page *67*, *69*

B

Blanket Schedule Advanced Search task
    associated program *48*
Blanket Schedule Committed Not Equal Planned alert
    associated program *48*
Blanket Schedule Committed Quantity decreased from previously Committed Quantity alert
    associated program *48*
Blanket Schedule No Response From Supplier in x days alert
    associated program *48*
Blanket Schedule Planned Quantity Changed from previously generated Planned Quantity alert
    associated program *48*
blanket schedules
    overview *78*
    revising quantities *80*
buyer distribution list, setting up *17*
buyer workspace page *43*

C

Collaborative Portal, overview *1*
Configure Alert Parameters page *50*
configuring the SRM portlet *44*
customer notification of purchase orders in transit *19*

D

date selection (43S/DS) *20*
date tolerances, setting up *16*
Demand Greater Than Capacity alert
    associated program *48*
distribution list for buyer *17*

E

Edit Ad Hoc Schedules page *80*, *80*
Edit Line Item Detail page *71*, *71*, *71*, *72*
Edit Order to Acknowledge page *67*
Edit Supplier Schedule page *79*, *80*
electronic mail boxes (02/MB) *8*

F

filter acknowledge status (43/AS) *10*
filter date search SRM (43/DS) *10*
forecasting *39*

I

implementation, of SRMC *2*
Inventory Advanced Search task
    associated program *48*
inventory information, reviewing *72*
inventory inquiry, setting up *30*

K

kanban processing
    in the SRM portlet *80*
    setting up in the SRM portlet *81*
Kanban Replenishment Capacity (P3019) *82*

L

lean procurement *77*

M

Move Line Items on Route page *71*, *72*
movement detail sort options (43/OD) *25*
movement header sort options (43/OH) *25*
movement in route *69*
Movement In Route Advanced Search task
    associated program *48*

N

notifications, shipments
    overview *19*
    sending *71*
Notify Order Shipment page *70*, *71*

O

Order Activity Rules - Revisions form *9*, *12*

order activity rules, setting up 12
order statuses (43/OS) 11

P

P04111 program
processing options 36
reviewing payment information 75
setting up 35
P3019 program 82
P34301 program
overview of blanket schedules 78
processing options 40
setting up 39
P34302 program
overview 78
processing options 41
P41204 program
overview 72
processing options 31
P4310 program, setting up for self-service 6
P4310SS program
overview 35
processing options 37
setting up 6
P4312 program
processing options 23
setting up for self-service 6
P43121SS program
overview 74
processing options 34
setting up 32
P4312S program
processing options 21
setting up 19
P43214 program, setting up for self-service 6
P43230SA program
processing options 85
P43250 program 24
P43250SS program
processing options 26
usage 24
P4334SS program
processing options 84
P43S01 program
overview 6
processing options 17
revising purchase orders 8
P43S05 program
processing options 29
setting up 27
using 73
payment inquiry, setting up 35
payments, reviewing 75
PO Acknowledgements Advanced Search task
associated program 48
PO Awaiting Shipment Advanced Search task
associated program 48
PO inquiry search dates (43S/ID) 28, 28
PO inquiry sort options (43/IQ) 29
PO inquiry status meaning (43S/IS) 27
PO Receipts (P4312)
processing options 23
setting up for self-service 6
portlet, SRMSRM portlet 1
portlets
configurable 1
viewable 1
procurement cycle 65
purchase orders
acknowledging 6, 66
approving changes 8, 66, 69
inquiring on 27
process 65
reviewing 73
reviewing orders awaiting acknowledgement 68
setting up buyer approval 17
setting up date tolerances 16
setting up tolerance rules 16
splitting lines 7, 66, 68
submitting acknowledgements 68
Purchase Orders (P4310), setting up for self-service 6
Purchase Orders Advanced Search task
associated program 48
Purchase Orders At Route Step alert
associated program 49
Purchase Orders At Route Step More Than x Days alert
associated program 49
Purchase Orders At Status alert
associated program 49
Purchase Orders Awaiting Acknowledge alert
associated program 49
Purchase Orders Awaiting Acknowledgement Next x Days alert
associated program 49
Purchase Orders Awaiting Acknowledgement Past Due alert
associated program 49
Purchase Orders Awaiting Shipment alert
associated program 49
Purchase Orders Awaiting Shipment Next X Days alert
associated program 49
Purchase Orders Awaiting Shipment Past Due alert
associated program 49
Purchase Orders Next x Days alert
associated program 49
Purchase Orders On Hold alert
associated program 49
Purchase Orders Past Date alert
associated program 49
Purchase Receipts Inquiry (P43214)
setting up for self-service 6
Purchasing Tolerance Rules Revisions form 9, 16

Q

quantities
revising ad hoc schedules 80
revising blanket schedules 80
queues
setting up 8
setting up queue properties 17
Queues Property Revisions form 9, 17

R

receipt detail sort (43/RD) 20
receipt header sort (43/RH) 21
receipt inquiry search dates (43S/RD) 32
receipt inquiry sort options (43/RQ) 33
receipt inquiry status (43S/RS) 33
receipt inquiry, setting up 32

receipt routing
advancing 72
editing movement details 72
overview 69
setting up 24
Receipt Routing Movement and Disposition program (P43250) 24
receipts, reviewing 74
release schedules, setting up 39
routing
advancing 72
editing movement details 72
overview 69

S

schedules, setting up for supplier 39
Search For Ad Hoc Schedules page 79
Search for Inventory Information page 73
Search for Order Lines to Notify page 70
Search for Orders page 73
Search for Orders to Acknowledge page 66, 67
Search for Payment Information task
associated program 49
Search for Receipt Lines task
associated program 49
Search for Receipts page 74
Search For Schedule page 79
Select Alerts page 46
Self Service - Purchase Order Inquiry (P4310SS)
overview 35
processing options 37
setting up 6
self service order types (43/OT) 5
Self Service Quote Response Entry (P4334SS)
processing options 84
Self-Service - Inventory Information Inquiry (P41204)
overview 72
processing options 31
Self-Service - Movement in Routing (P43250SS)
processing options 26
usage 24
Self-Service - Purchase Order Receipts (P4312S)
processing options 21
setting up 19
Self-Service - Supplier Payment Inquiry (P04111)
processing options 36
reviewing payment information 75
setting up 35
self-service A/P sort option (04/SO) 35
self-service movement steps (43/MS) 26
Self-Service Supplier Analysis Summary (P43230SA)
processing options 85
self-service, activating 6
shipment details, revising 71
shipment notifications
overview 69
sending 71
setting up 19
shipments
advancing the routing 72
editing movement details 72
Split and Acknowledge PO Lines page 67, 68
split purchase order lines 66
splitting purchase order lines 7
SRM - PO Acknowledgement (P43S01)
overview 6
processing options 17
revising purchase orders 8
SRM - PO Inquiry (P43S05)
processing options 29
setting up 27
using 73
SRM - Receipt Inquiry (P43121SS)
overview 74
processing options 34
setting up 32
SRM portlet
configuring 44
overview 1, 43
setting up kanban processing 81
SRS (supplier release scheduling)supplier release scheduling 39
SSS Quote Status portlet 83
SSS Search portlet 83
SSS Supplier Alerts portlet 83
SSS Supplier Order Status portlet 83
SSS Supplier Performance portlet 83
SSS Tasks portlet 83
status codes, setting up 12
Supplier Relationship Management Collaboration (SRMC)
implementation 2
overview 1
Supplier Relationship Management Portlet Choice page 46
Supplier Relationship Management portletSRM portlet 1
supplier release scheduling
overview 77
setting up 39
Supplier Schedule Revisions (P34301)
overview 39
overview of blanket schedules 78
processing options 40
supplier self-service page 43
Supplier/Item Relationships form 9, 16

T

tolerance rules
exceeding 66
setting up date tolerances 16
setting up quantity and amount tolerances 16

U

UDCsuser-definedcodes (UDCs) 5
user-defined codes (UDCs)
02/MB (electronic mail boxes) 8
04/SF (A/P self-service filter option) 35
04/SO (self-service A/P sort option) 35
43/AH (acknowledge header sort option) 10
43/AQ (acknowledgement detail sort op) 11
43/AS (filter acknowledge status) 10
43/DS (filter date search SRM) 10
43/IQ (PO inquiry sort options) 29
43/MS (self-service movement steps) 26
43/OD (movement detail sort options) 25
43/OH (movement header sort options) 25
43/OS (order statuses) 11
43/OT (self service order types) 5
43/RD (receipt detail sort) 20
43/RH (receipt header sort) 21
43/RQ (receipt inquiry sort options) 33
43S/DS (date selection) 20
43S/ID (PO inquiry search dates) 28, 28

43S/IS (PO inquiry status meaning) *27*
43S/RD (receipt inquiry search dates) *32*
43S/RS (receipt inquiry status) *33*

V

View Ad Hoc Schedules page *79*
View Inventory Detail page *73*
View Inventory Information page *73*
View Item Detail page *75*
View Kanban Capacity page *82*
View Kanban Capacity task
associated program *49*
View Order Detail Line Information page *74*
View Order Detail page *75*
View Order Detail Status page *73*
View Order Header Information page *67*, *68*
View Orders on Route page *71*
View Orders to Ship page *70*
View Payment History page *75*
View Payment Information Detail page *75*
View Payment Information page *75*
View Receipt Detail Status page *74*
View Receipt Line Detail page *76*
View Receipt Line Information page *74*
View Receipt Lines page *75*
View Supplier Schedule page *79*
viewable portlets *1*
Viewing Kanban Capacity alert
overview *82*

W

workflow messages, setting up for buyer *17*
workflow queues
setting up *8*
setting up queue properties *17*