Peregrine

Get-Resources™ 2.5

Installation and Administration

For Windows, Solaris, and Linux

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Peregrine SYSTEMS®

If you have comments or suggestions about this documentation, please send e-mail to support-sd@peregrine.com

This edition applies to version 2.5 of the licensed program.

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Introducing Get-Resources

Get-Resources™ from Peregrine Systems® is part of the Get-It™ suite of Employee Self-Service products and provides a way for businesses to make the procurement of resources available to users through the corporate intranet.

With If you are using AssetCenter as your back-end system, you will have access to the AssetCenter product catalog for ordering purposes. Get-Resources processes the initial request through an approval cycle, showing an animated workflow display, and on through the procedures of ordering and receiving the items. A sample AssetCenter database is included with Get-Resources. Configuration instructions for a Get-Resources system using AssetCenter begin on page 68.

If you use Get-Resources with Peregrine's business-to-business (B2B) products, you can automatically exchange secure business transactions with other e-businesses and supplier networks. Information and configuration instructions for B2B begin on page page 93.

About this Guide

This guide is designed to be used by administrators configuring and maintaining Get-Resources.

To use this guide effectively, you should have a working knowledge of the following:

- XML and ECMAScript (or JScript/JavaScript)
- Operating guides, reference manuals, and other documentation for your PC hardware and operating system
- Tomcat documentation located in the ...Tomcat\docs directory
- AssetCenter
- The back-end system you will be using with Get-Resources

Related Documentation

This guide should be used in conjunction with the AssetCenter guidesguides for the back-end system you are using (AssetCenter or ServiceCenter).

Organization of the Guide

The guide is divided into these sections:

- Section I: Installation and Overview—includes instructions for installing Get-Resources, information about general administration tasks, and an introduction to the interface.
- Section 2: Get-Resources with AssetCenter—configuration, administration, and features that are specific to Get-Resources systems that use AssetCenter as the back-end system.
- Section 3: Get-Resources with B2B—configuration, administration, and usage of Get-Resources and Peregrine's B2B products.
- Section 3: Get-Resources with ServiceCenter—configuration, administration, and features that are specific to Get-Resources systems that use ServiceCenter as the back-end system.

Conventions Used in this Guide

Screen shots in this guide are included as examples only. Get-Resources screens are shown using the Classic theme.

The following documentation conventions are used in this guide:

Object	Example
Button	Click **Next**
File name	The `login.asp` file

Sample script or XML code	`var msgTicket = new Message( "Problem" );`
	
	`...`
	`msgTicket.set( "_event", "epmc" );`
	The ellipsis (...) is used to indicate that portions of a script have been omitted because they are not needed for the current topic. Samples of code are not entire files, but they are representative of the information being discussed in a particular section.

Book title	Refer to the *Open Application Architecture Platform Administrator's Guide.*
Menu option	Select Start>Program Files.
Keyboard key	Press ENTER.

SECTION I

Installation and Overview

CHAPTER 1

Installing Get-Resources

This chapter describes the requirements for installing and configuring Get-Resources on Windows and UNIX. For step-by-step installation instructions, refer to the *Open Application Architecture Platform Administrator's Guide*.

During the installation, you will have the opportunity to install the following:

- Java 2 SDK Standard Edition v1.3.1_01, a Java run-time environment.
- Tomcat 3.2.4, an application server.
- Peregrine Open Application Architecture Platform (OAA platform) and Get-Resources.

Get-Resources 2.5 provides support for the following additional application servers:

- WebSphere 4.0
- WebLogic 6.0 SP1
- JRun 3.1

For more information, refer to the compatibility matrices on the Customer Support Web site at support.peregrine.com.

Important: If you will be using one of these application servers instead of Tomcat, use the procedures in *Open Application Architecture Platform Administrator's Guide* to install the Java 2 SDK (if you do not already have this version installed) and Get-Resources. The *Open Application Architecture Platform Administrator's Guide* also contains instructions for configuring your application server.

Note: AssetCenter is not included on the Get-Resources CD. You can find the installation instructions for AssetCenter in the AssetCenter documentation.

Installation Requirements

This section outlines the recommended minimum configuration for proper installation and configuration of Get-Resources. Before beginning the installation, ensure that you have the required software and hardware, as described in the following sections.

Note: The version of OAA that ships with Get-Resources 2.5 may not be compatible with other OAA-based applications. Please check the compatibility matrices for your applications on the Customer Support Web site before installing. You can access the Customer Support Web site at http://support.peregrine.com.

Software

Windows

Operating system	Microsoft Windows NT Server, version 4.0 SP4 or later, or Windows 2000 Server.
Web server	Apache Server 1.3.20 or Microsoft IIS Server 4.0 or 5.0 (available from the Microsoft Web site). The Apache Server is recommended if you are using Tomcat for your application server.
AssetCenter (backend system)	You must have AssetCenter 3.51 or later installed. Get-Resources supports AssetCenter 3.51, 3.6, and 4.1. **Note:** The AssetCenter API must be installed on the same system as Get-Resources; however, the AssetCenter database can be on another system. This means that when you install AssetCenter, you must either proceed with: (1) a full installation, or (2) a custom installation, selecting the **AssetCenter API** option. AssetCenter must be installed and have a valid connection established to the database on the Get-Resources server. Get-Resources uses the amdb.ini file to determine how to attach to the AssetCenter database.
Japanese version of Get-Resources	You must install this version on Japanese Windows.

Solaris

Operating system	Solaris 2.7 or 2.8
Web server	Apache 1.3.20
AssetCenter (backend system)	You must have AssetCenter 3.51or later UNIX client installed. Get-Resources supports AssetCenter 3.51, 3.6, and 4.1.

Linux

Operating system	Red Hat Linus 6.2 or 7.x

Web server	Apache 1.3.20
AssetCenter (backend system)	You must have AssetCenter 3.51or later UNIX client installed. Get-Resources supports AssetCenter 3.51, 3.6, and 4.1.

Hardware

- Pentium, 400 MHz or faster, with at least 512 MB of RAM.
- Approximate disk space: 100 MB.

Pre-installation Considerations

Before beginning your installation, review the following information:

- Do you have a Java run-time environment installed? Java 2 SDK Standard Edition v1.3.1_01 is included on the installation CD and is required if you are using Tomcat as your application server.
- Do you have a supported Java application server installed? Tomcat 3.2.4 can be installed from the Get-Resources installation CD.

Note: If you will be using one of the alternate application servers, use this guide to install Get-Resources and then refer to the *Open Application Architecture Platform Administrator's Guide* for instructions for configuring your application server.

- If you do not want to install Get-Resources into the default folders, decide where you would like the files to be installed.

Installing Get-Resources for Windows

The complete installation includes these tasks, which must be completed in the following order:

1. Install the Java 2 SDK Standard Edition v1.3.1_01.
2. Install Tomcat 3.2.4 if you will be using Tomcat as your application server.
3. Install Get-Resources.
4. Configure a connection between Tomcat and Apache.

Each of these tasks is described in the *Open Application Architecture Platform Administrator's Guide*.

Installing Get-Resources for UNIX

The complete UNIX installation includes these phases, which you must complete in the specified order:

1. Install Java 2 SDK Standard Edition v3.1_01, a Java run-time environment.
2. Install Tomcat 3.2.4, an application server.
3. Install Peregrine OAA platform and Get-Resources.
4. Perform additional configuration steps.
5. Establish a connection between the Tomcat application server and the Apache Web server.

   You can install the Get-Resources components from the installation CD. For instructions, refer to the *Open Application Architecture Platform Administrator's Guide*.

Note: You must have the AssetCenter UNIX client already installed on the server. For installation instructions, see the AssetCenter documentation. During the AssetCenter installation, note the location where the amdb.ini file is installed.

CHAPTER 2 Administration

This chapter includes general information for administering your Get-Resources system. This information applies whether you are using AssetCenter or ServiceCenter for your back-end system and provides an introduction to using the Admin module.

After reviewing this chapter, refer to Section 2, *Get-Resources with AssetCenter*, beginning on page 65, for specific administrative tasks for AssetCenter systems.

The primary tool you will use to set parameters for your Get-Resources system is the Admin module, which enables you to:

- Monitor the connection between the Get-Resources server and the back-end servers.
- View the server log, which shows all activity on the Get-Resources server.
- View and change settings.
- Start and stop various ECMAScript functions using Show Script Status.
- Show Message Queuing to view queue contents.
- Use Queue Status to view all queues.
- Set the adapter you use for the connection to your database.

This chapter also includes instructions for starting and stopping Tomcat, setting optional Tomcat variables, user self-registration, changing your password, and displaying information about forms and scripts that are running.

Starting and Stopping the Tomcat Server

To start or stop Tomcat:

1. Open a command prompt window.
2. Change directories to <*tomcat*>\bin.
3. Type one of the following commands:

To do this...	On...	Type this...
Start Tomcat	Windows	startup
Start Tomcat	UNIX	tomcat.sh start
Stop Tomcat	Windows	shutdown
Stop Tomcat	UNIX	tomcat.sh stop

Setting Optional Tomcat Parameters

There are a number of Tomcat parameters that you can set to optimize your system. A list of parameters and instructions for using them can be found in the documentation for the Java SDK. The README file for the Java SDK (included on the Get-Resources installation CD) has information about Java documentation and points you to the Sun Java site, currently java.sun.com.

Important: If you change any Tomcat parameters, try the settings out in a development environment before you use them in a production system. Use the following procedure to set the values for a single work session.

Setting Tomcat Parameters for a Single Session

To set Tomcat variables for a single session:

1. Stop Tomcat if it is running.

2 In the MS-DOS Command Prompt window that you use to start Tomcat, specify the variable using the following syntax:

set TOMCAT_OPTS *xxxx*

where *xxxx* is the variable as defined in the Java documentation.

3 Press ENTER.

4 Start Tomcat.

The variable you set only remains in effect for the current working session. When you stop Tomcat, the variable resets to the default value.

Setting Tomcat Parameters Permanently

To change Tomcat parameters permanently, add the variables to the environment variables for your system as follows:

1 Open your **System Properties** dialog box, and then select the **Environment** tab.

2 Add the parameter and its value to either the **System Variable** or **User Variable** section as needed.

3 Click **OK**.

Accessing the Admin Module

The Peregrine Portal administrator login page enables access to the Admin module. You will need to use the Admin module to define the settings for Get-Resources.

A default administrator, Admin, has been established so that you can have access to the Admin module without connecting to a back-end system. After you have configured your system, you will also be able to access the Admin module from the Navigation menu or from the Administration tab on the Home page.

Important: When you change parameters using the Admin module, a local.xml file is created in the \<*tomcat*>\webapps\oaa\WEB-INF directory to store these parameters. If you reinstall Get-Resources, make a copy of this file before you begin the installation and store it outside your Get-Resources installation. Failure to do this will result in your parameter values being lost during the new installation.

To access the Peregrine Portal administrator login page:

1. Verify that your application server (for example, Tomcat) is started.
2. In your Web browser Address field, type:

   localhost/oaa/admin.jsp
3. Press ENTER.

   The Portal administrator login page appears.
4. In the **Name** box, type Admin. No password is required.
5. Click **Login as Administrator**.

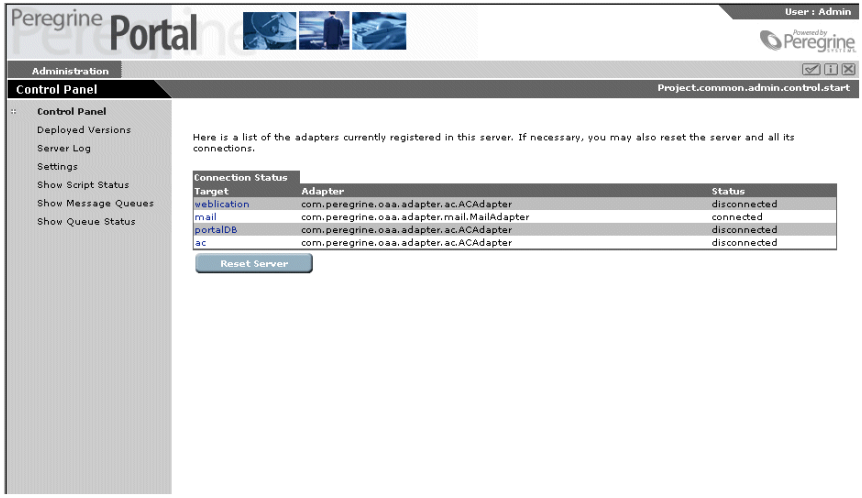
   The **Control Panel** page appears.

The activities available in the Admin module include:

- Control Panel—check the status of connections to the back-end systems.
- Deployed Versions—view and print a list of the packages that were deployed onto your system during the installation.
- Server Log—view activity on the Get-Resources server.
- Settings—view and change settings in the archway.ini file.
- Show Script Status—verify which scripts are running. You can also start and stop scripts from this window.
- Show Message Queues—display a list of all message queues.
- Show Queue Status—see the current status of the queues: operational and unlocked, or suspended.

Using the Control Panel

When you first access the Admin module, the **Control Panel** page appears.



Use this page to check the status of the connections to the databases you are accessing with Get-Resources and your Web applications.

Note: When you first access this page, the status for all targets is *disconnected* because the targets are not defined. Procedures for setting these parameters are included in Section 2 and Section 3 of this guide.

You can also reset the connection between the Archway servlet and the adapters to the back-end systems:

▶ Click **Reset Server.**

A message appears at the top of the page to indicate that the connections were reset.

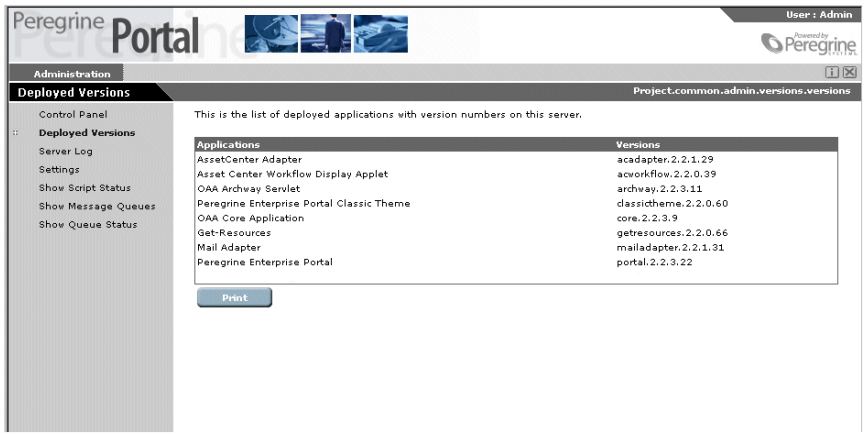
Viewing and Printing the List of Deployed Versions

The Deployed Versions page lists all of the packages that were deployed during the installation, including the version number of each package.

To view the Deployed Versions list:

1 In the left pane, click **Deployed Versions**.

A list of the installed packages appears.



2 Click **Print** to print the list.

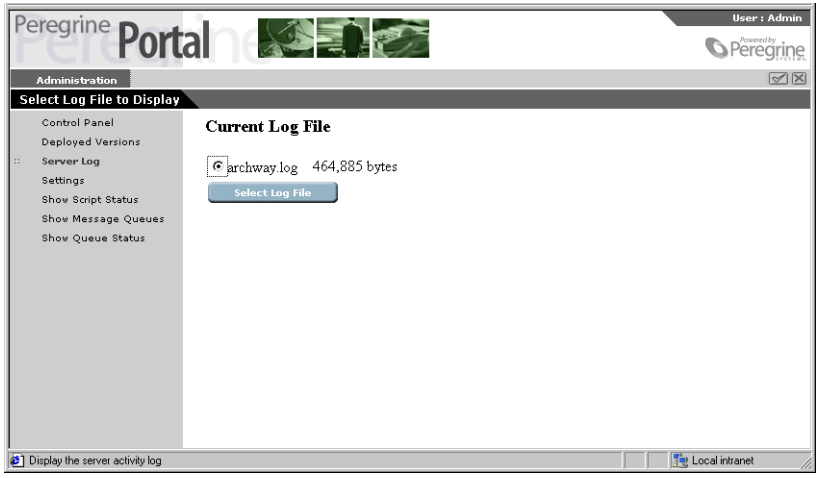
Viewing the Server Log

The **Server Log** page provides a history of server events.

To view the Server Log page:

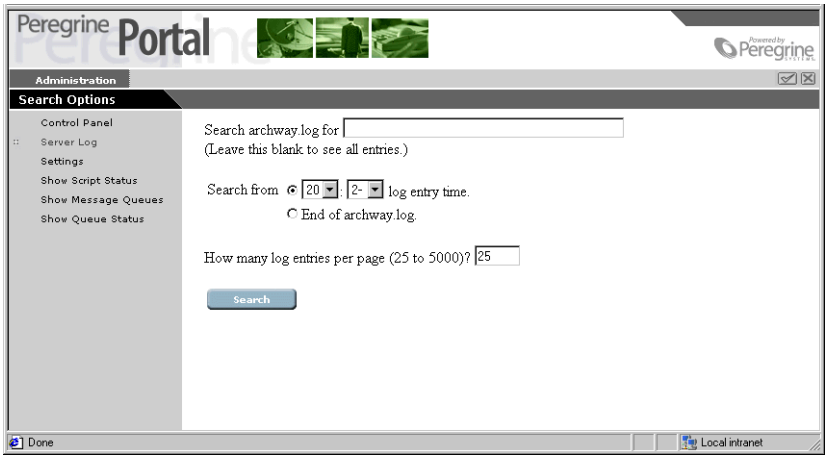
1 From the **Activity** menu, select **Server Log**.

A list of the available log files appears.



2 Select the log file you want to view, and then click **Select Log File**.

A search form appears. You can search for a particular item, search from a particular time to the end of the log, and set the number of lines of the log entry that you want to view on each page.



3 After you make your selections, click **Search**.

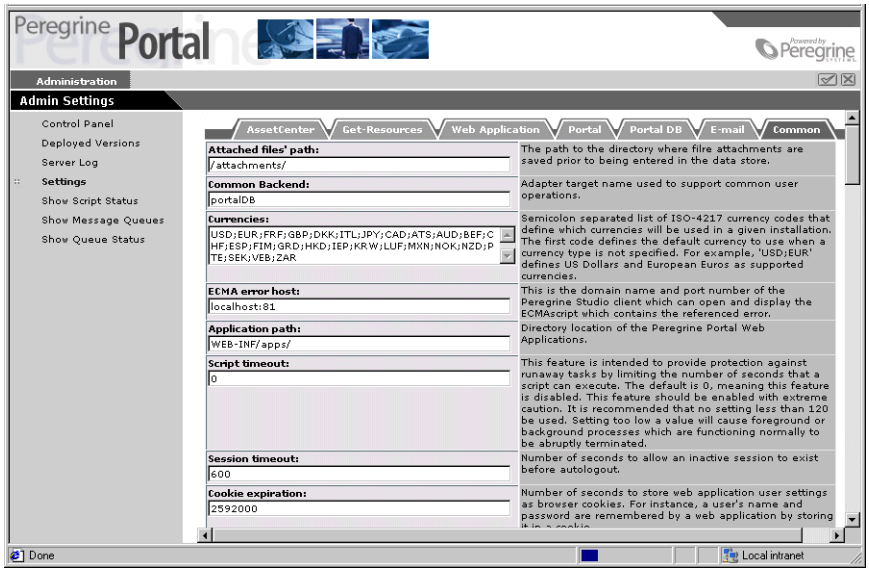
The log file entries you requested appear on the screen.

Use the links at the top and bottom of the log file display to navigate through the log. You can also return to the **Search Options** or **Select Log File** pages to make new selections.

The **Filter Pages for** drop-down list lets you filter the log by thread ID. This displays only the messages from the thread that you define. For example, if you have a script poller running periodically, its messages are separated by many other messages. Filtering by the specific thread displays only the messages from the script poller.

Using the Settings Page

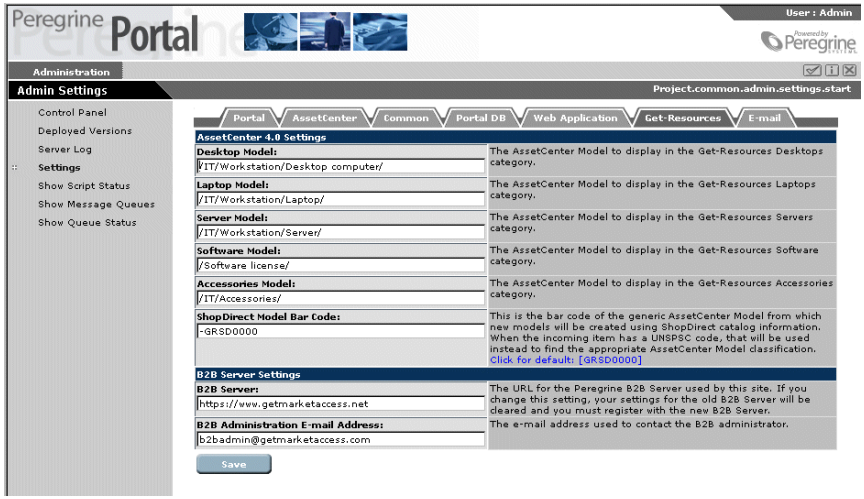
In the left pane, click **Settings** to display the current parameter settings.



The **Settings** page of the Admin module consists of several tabs. Get-Resources has the following **Settings** page tabs:

- Common
- E-mail
- Portal DB
- Portal
- Web Application
- Get-Resources
- A tab for the back-end system, either ServiceCenter or AssetCenter

Each field on the tabs includes a detailed description of the field. Many of the fields are already filled in with default values that are appropriate for most systems. If you change a value, a link appears in the field description. Click on this link to return to the default value.



When you make changes using the **Admin Settings** page, a local.xml file is created in the C:\<*Tomcat*>\webapps\oaa\WEB-INF directory. All changes to property settings are stored in this file. Restart your application server after making changes that are stored in local.xml.

Important: If you change parameters on the **Admin Settings** page and then need to reinstall Get-Resources, it is important that you copy the local.xml file to a location other than your Get-Resources installation or all of your settings will be lost when you redeploy Get-Resources. After the installation, move the copy back to the WEB-INF directory.

Defining a Parameter

To define a parameter:

1 Locate the setting you want to change and type the new parameter.

Note: If you have previously changed a setting and want to return to the default setting, click the **Click for default** link displayed in the description area for the parameter you want to revert. This link is displayed only after a setting is changed from the default.

2 Scroll to the bottom of the page, and then click **Save**.

The **Control Panel** page appears.

3 Click **Reset Server**.

A message appears at the top of the **Control Panel** page after the server is reset.

Verifying Script Status

The name and status of any script that is currently running appears on the **Script Status** page. Click on the script to enable or disable it.

Displaying Message Queues

The Message Queues appear whenever a queue has data waiting to be transferred. This activity is used primarily by B2B.

Showing Queue Status

To verify or change the status of the message queues:

1 From the **Activity** menu, select **Show Queue Status**.

2 Click **Toggle Queue Operations** to change the queues from **operational and unlocked** to **suspended**.

Configuring your System for Multiple Languages

This section contains information for configuring Get-Resources to use languages other than English, including tables of supported country and currency codes.

Setting the Content Type Encoding

Content type encoding is a mapping of a given character set to numerical values. A character set includes all of the alphabet and symbols used to communicate in a language.

The following settings are available with Get-Resources:

- United States and Europe—ISO-8859-1, the default value for Windows.
- Japanese (Windows only)—Shift_JIS
- Polish (Windows only)—ISO-8859-2

To set the encoding:

1. Log in to Get-Resources as an administrator and click the **Admin** module. In the **left pane**, click **Settings**.
2. On the **Common** tab, change the **Content type encoding** field to the desired setting.
3. Click **Save** at the bottom of the form.
4. Reset the server from the **Control Panel** form.

Setting the Locale Code

When a user logs in to Get-Resources, the login programs detect the preferred language set in the browser and determines if the user's language is supported. If the language is supported, the Get-Resources interface appears in that language.

If the language is not supported, the default language is used. The default language is set in the Locales field in the **Admin** module. The first entry in this field is the default language.

The following list displays the languages that Get-Resources supports, along with the corresponding country codes:

Language	Country Code
English	en
French	fr
German	de
Italian	it
Japanese	ja
Polish	pl
Spanish	es

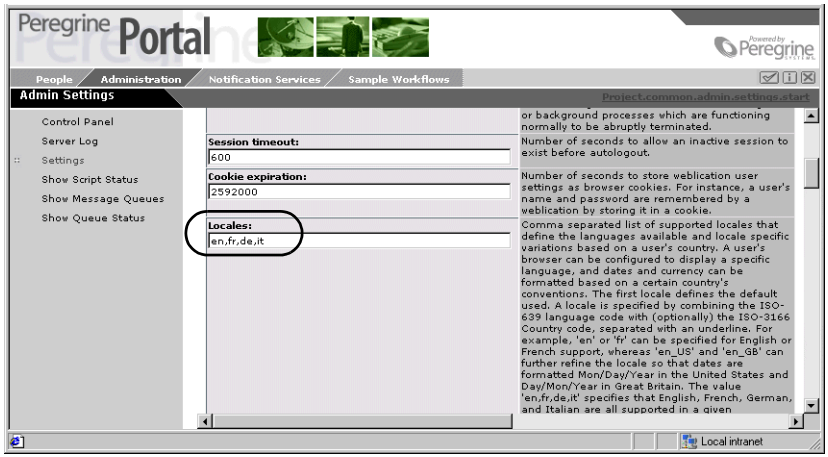
The following procedure includes instructions for setting the locale code. You can use the same procedure for setting the currency code.

To change the language you are using:

1 Open the **Admin Settings** page.

2 In the Locales field, type the two-letter designation of the language you want to use.

Note: If you would like a drop-down list from which users can choose the language they want to use, include English (en) in your list of languages in the Locales field. Include all the languages in this field that you want to have supported, separated by commas. The following example shows settings for English, French, German, and Italian locales.



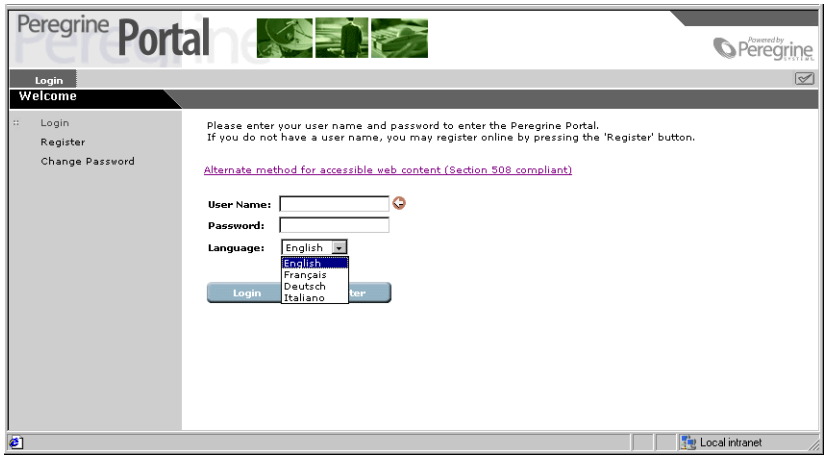
3 Scroll to the bottom of the **Settings** page and click **Save**.

The **Control Panel** page appears.

4 Click **Reset Server** to reset the connection to the back-end systems and import the new information.

If you have set just one language in the Locales field, all window content appears in that language.

If you have set multiple languages, the login screen appears in English with a language field and a drop-down list from which the user can select a language. However, if the back-end system is set up to use a different language than Get-Resources, data from that system appears in the language supplied by that system.



Setting the Currency Code

The following chart shows the ISO codes for the supported currencies. These codes are entered in the "Currencies" fields in the **Admin Settings** page of the Admin module.

Currency Code	Currency Name
ALL	Albania, Lek
ARP	Argentine Peso
ATS	Austria, Schilling
AUD	Australian Dollar
BEF	Belgian Franc
BHD	Bahraini Dinar
BOB	Bolivia, Boliviano
BRR	Brazilian Real
BYR	Belarussian Ruble

Currency Code	Currency Name
CAD	Canadian Dollar
CHF	Swiss Franc
CLP	Chilean Peso
CNY	China, Yuan Renminbi
COP	Columbian Peso
CRC	Costa Rican Colon
DEM	Germany, Deutsche Mark
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Ecuador, Sucre
EEK	Estonia, Kroon
EGP	Egyptian Pound
ESP	Spanish Peseta
EUR	Euro (Austria, Belgium, Germany, Spain, Finland, France, Ireland, Italy, Luxembourg, Netherlands, Portugal)
FIM	Finland, Markka
FRF	French Franc
GBP	United Kingdom, Pound Sterling
GRD	Greece, Drachma
GTQ	Guatemala, Quetzal
HKD	Hong Kong Dollar
HNL	Honduras, Lempira
HUF	Hungary, Forint
IEP	Ireland, Punt
ILS	New Israeli Shekel
ITL	Italian Lira
JOD	Jordanian Dinar

Currency Code	Currency Name
JPY	Japan, Yen
KRW	Republic of Korea, Won
KWD	Kuwaiti Dinar
LBP	Lebanese Pound
LTL	Lithuanian Lita
LUF	Luxembourg Franc
LVL	Latvian Lat
LYD	Libyan Dinar
MAD	Moroccan Dirham
MKD	Macedonia, Denar
MXP	Mexican Peso
NIO	Nicaragua, Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NZD	New Zealand Dollar
OMR	Oman, Sul Rial
PAB	Panama, Balboa
PEN	Peru, Nuevo Sol
PLZ	Poland, Zloty
PTE	Portuguese Escudo
PYG	Paraguay, Guarani
QAR	Qatari Rial
ROL	Romania, Leu
RUR	Russian Ruble
SAR	Saudi Riyal
SDD	Sudanese Dinar
SEK	Swedish Krona
SIT	Slovenia, Tolar

Currency Code	Currency Name
SKK	Slovak Koruna
SVC	El Salvador Colon
SYP	Syrian Pound
THB	Thailand, Baht
TND	Tunisian Dinar
TRL	Turkish Lira
TWD	Taiwan Dollar
UAH	Ukraine, Hryvnia
USD	US Dollar
UYU	Uruguay, Peso Uruguayo
VEB	Venezuela, Bolivar
YER	Yemeni Rial
YUM	Yugoslavia, New Dinar
ZAR	South Africa, Rand

All dates and currency are displayed and edited in the user's language. Calendars display the translated weekday name and start the week on the user locale's first day of the week.

Currency is displayed using the correct symbol and decimal indicator. However, the decimal point and the thousands separator are determined by the user's preferred language and not the currency being displayed. For example, a French-speaking user will see US dollars as $1 234,00, a German-speaking user will see $1.234,00, and an English-speaking user will see $1,234.00.

Displaying Form Information

You can use the Admin module to configure Get-Resources forms to display the location and file name of the current form.

Note: Peregrine recommends that you perform this configuration step only if directed to do so by Peregrine Customer Support since turning on this feature can affect application performance.

To display form information:

1 With the Admin module displayed, click **Settings**.

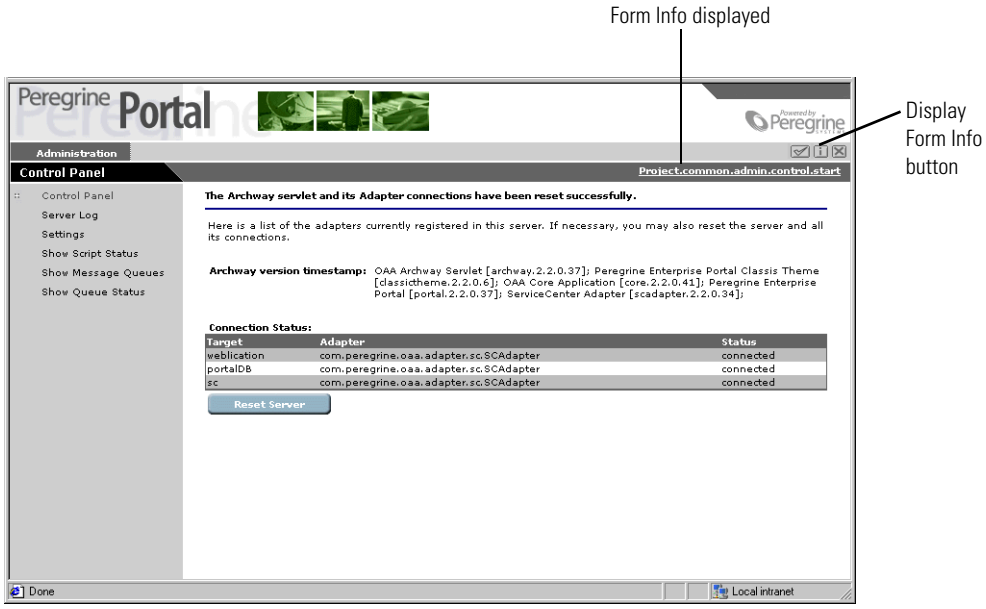
2 Scroll down to the **Show form info** field, and then select **Yes**.

3 At the bottom of the page, click **Save**.

The **Control Panel** page appears.

4 Click **Reset Server**.

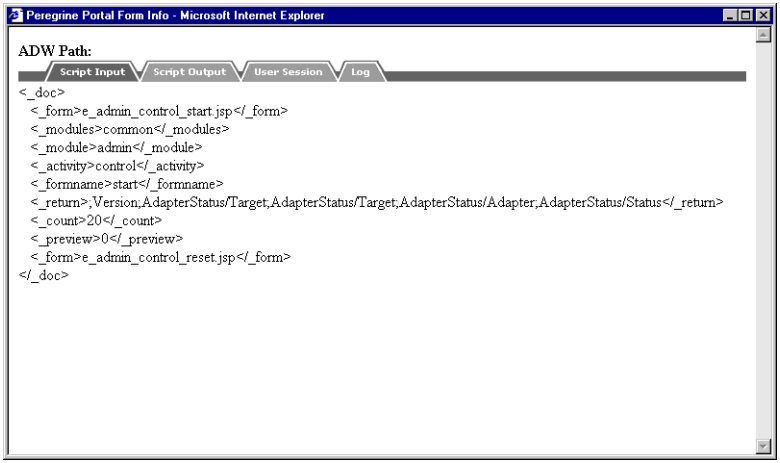
The name of the form appears at the top of each form.



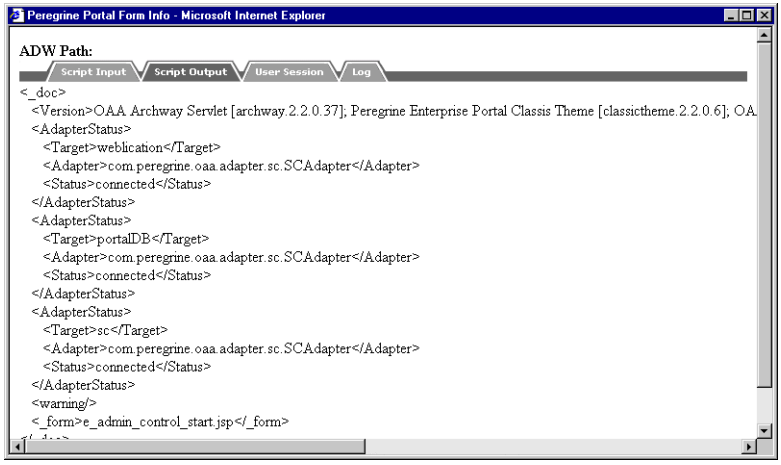
Displaying Form Details

You can also display detailed information about the current form. Click the **Display Form Info** button at the top right of the form. A separate window appears with the following tabs:

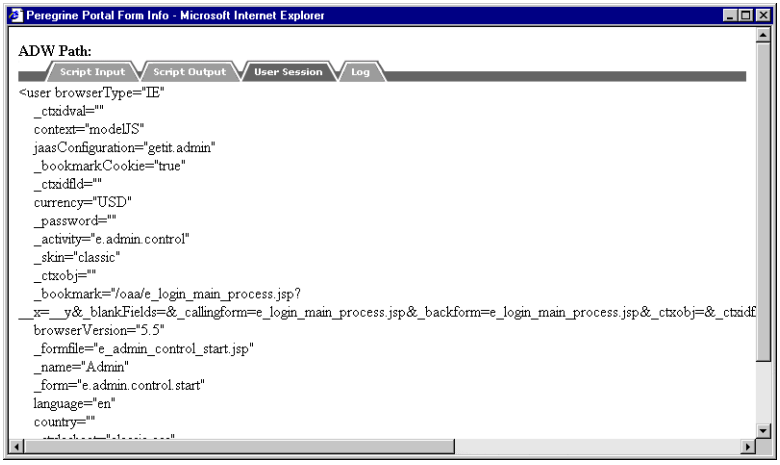
- Script Input—the script that sends a request to the back-end system.



- Script Output—the information returned by the script request to the back-end system.



- User Session—details about the current user session, including browser type, back-end system version, and the access rights established for this user.



- Log—log of actions taken by the script to execute the form.

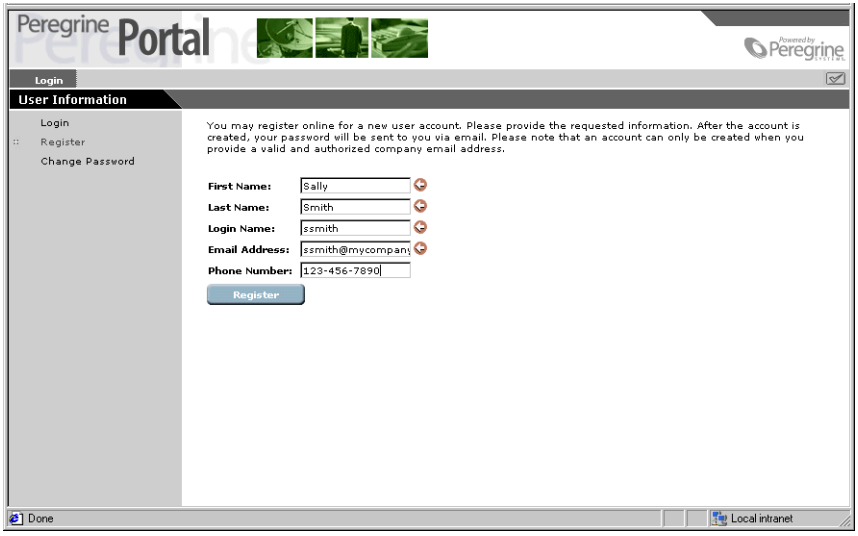
User Registration

A user can self-register if he or she has not already been established in the back-end system database. When the user registers, a new user account with basic user login rights is created in the back-end system. Refer to the *Open Application Architecture Platform Administrator's Guide* for more information about the user self-registration process.

To register from the Login page:

1 In the left pane, click **Register**.

2 Complete the information requested in the User Information form. Note that the first four fields are required, as indicated by the arrows to the right of each field.



3 Click **Register**.

A message appears, indicating that you have been registered as a new user. You should receive a password via e-mail. See the section, *Changing Your Password* on page 43 for instructions on changing your password.

4 In the left pane, click **Login** to access the **Login** page.

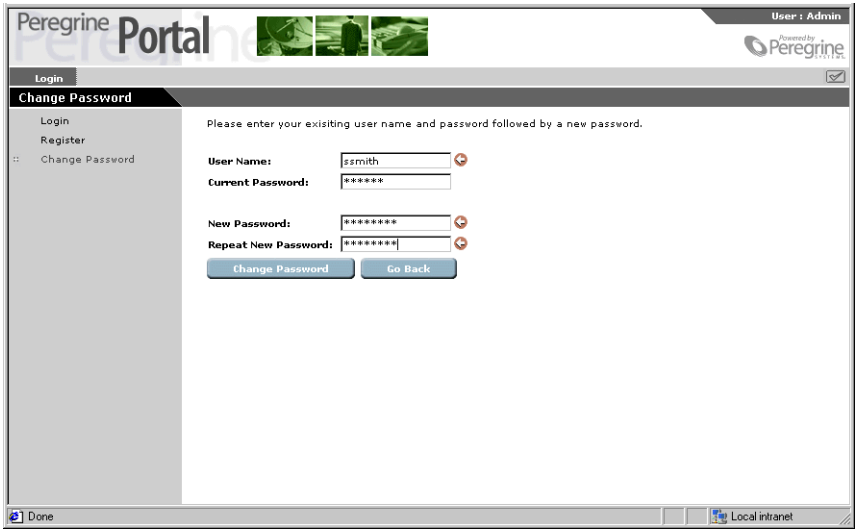
Changing Your Password

You can easily change your password from the **Login** page.

To change your password:

1. Display the **Welcome** page of the Peregrine Portal.
2. In the left pane, click **Change Password**.

3 In the **Change Password** form, type your user name and current password.



4 Type the new password you want to use, and then repeat it in the second field for verification.

5 Click **Change Password**.

A message appears to indicate that your password was changed.

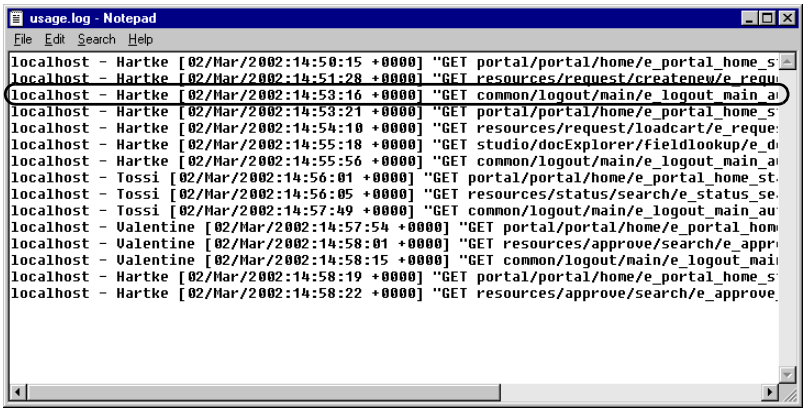
Logging and Monitoring User Sessions

A record of user logins is stored in the `usage.log` file, located in the bin directory of your application server installation. With this file, you can determine which application is being used and how many users access an application during a day.

Understanding the usage.log File

The following line shows an excerpt from a usage.log file:

localhost - Hartke [02/Mar/2002:14:53:21 +0000] "GET portal/portal/home/e_portal_home_start.jsp HTTP/1.0" 200 0



Each login appears on a separate line. Within a single user session, only one line is logged by each module.

The following table shows the meaning of each element in the log entry:

Remote Host	Rfc931	User Login	Date	Request	Status	Bytes
localhost	-	Hartke	[02/Mar/2002:14:53:21 +0000]	"GET portal/portal/home/e_portal_home_start.jsp HTTP/1.0"	200	0

The following list describes the columns in the table:

- **Remote Host**: The remote host name or IP address if the DNS host name is not available or was not provided.
- **Rfc931:** The remote login login name of the user. This is always a dash, because this information is not needed.
- **User Login:** The user name authenticated to log in to Get-Resources.
- **Date:** The date and time of the request.

- **Request**: The module accessed by the user. The name of the module is the first part of the GET parameter. In the example above, the module accessed is *portal*, the location of the login script.
- **Status**: The HTTP response code returned to the client. This value is always 200 to specify that it was a valid request.
- **Bytes**: The number of bytes transferred. The number is always entered as 0, because this information is not needed.

Defining Log Settings

You can define the settings for the `usage.log` file using the **Settings** page in the Admin module. The file settings are located on the **Common** tab in a section titled **System Usage Logging**.

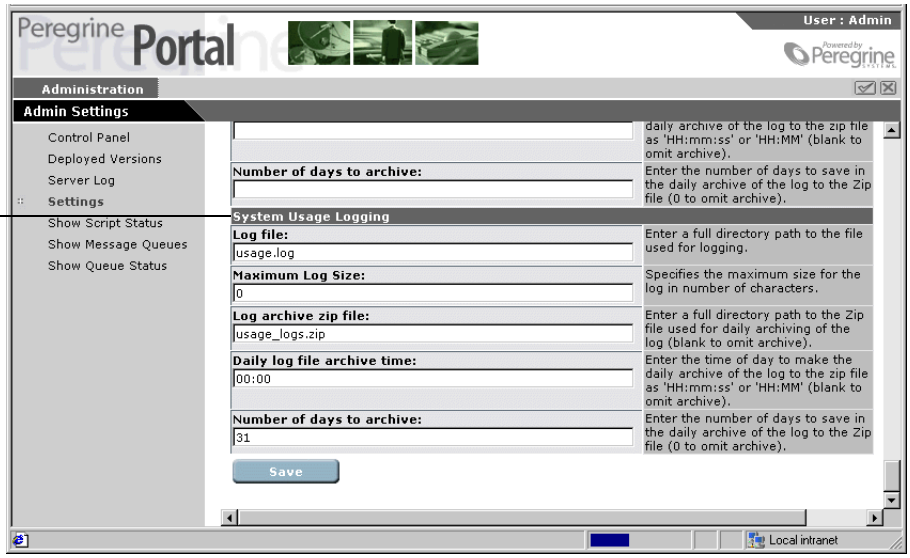
Usage logging is configured to create a daily archive of log file entries that are saved to a .zip file using the following two settings:

- **Daily log file archive time:** The time of day that you want a daily archive saved to a .zip file. Use the format hh:mm:ss or hh:mm. Leaving the field blank stops archiving from occurring. The default is 00:00.
- **Number of days to archive:** The number of days you want to save to the .zip file. The default is 31 days.

The default settings allow you to create a monthly report of usage logging.

The following screen shows the **System Usage Logging** section.

Ensure that you use the fields in the System Usage Logging section. The same fields also exist in the log secton for archway.log.



Personalization

The personalization feature enables you to tailor the application screens without manually changing and compiling code. In Get-Resources, personalization is available on forms in the Request module. The wrench icon in the upper right corner of a form indicates that personalization is available for that form.

Personalization Access Rights

There are several administrative tasks that you can perform to allow or deny access to personalization.

Personalization Hierarchy

Configuration of personalization is defined in a hierarchy of user access.

Typically, an administrator uses personalization to configure the contents and features of various screens, making the settings standard and default for all users of the system. In many organizations, this is the only type of personalization that is enabled.

It is also possible to establish specific settings that apply to different groups of users in the organization. For instance, users in the IT department may see a Product screen that has more details than users in other departments.

Finally, it is also possible to allow individual users to further customize their screens in addition to any default customization done at the global and departmental levels.

This personalization hierarchy is defined by an ECMAScript invoked for each user when they log into the system. The job of the script is to return a string showing the hierarchy for each user. For instance, consider a user named Hartke who works in the IT department. The user's hierarchy could be defined as follows:

```
/admin/IT/Hartke
```

This indicates that user Hartke should have access to all personalization settings defined at the admin level, plus any settings defined at the IT level. Finally, any personal settings are stored at the "Hartke" user level.

The default implementation is defined in the personalize.getHierarchy script. This script defines two levels of personalization:

- admin—this level is given to any user who has *getit.admin* or *getit.personalization.admin* rights.
- /admin/<user>—this level is given to all other users. Any settings defined at the /admin level are inherited, and any new changes are stored separately for each user.

You can modify the default implementation by tailoring the personalize.getHierarchy script as necessary.

User Personalization Rights

The personalization features rely on specific user rights in order to be enabled. These roles are:

getit.personalization—If defined, the user is classified as a Personalization End User. This is the default setting for all users. These users have access rights as defined by the *personalizeaccess* setting, which can be set to one of the following:

- Disabled – The end user operates with personalization settings defined by the administrator but has no rights to make changes.
- Enabled – The end user inherits default personalization settings, but also has access to add or remove fields to their screens.
- Limited – The end user inherits default personalization settings and has access to make changes. However, the changes are limited by the settings defined by the administrator—schema fields not included by the administrator are not available to the end user. In addition, the user is not allowed to make read-only fields editable.

getit.personalization.admin – If defined, the user is classified as an administrator and is given special rights, including:

- The ability to define whether the personalization functionality supports update, create, and delete operations.
- The ability to define settings that are inherited by all users.

Personalization Database

Personalization settings are stored in a database repository and processed at run time when a user logs on to the system. The storage is performed through an adapter target named weblication.

To enable personalization, the weblication name must be mapped to a valid adapter in the Adapter field in the appropriate Admin Settings page. For more information about Admin settings, see *Using the Settings Page* on page 28.

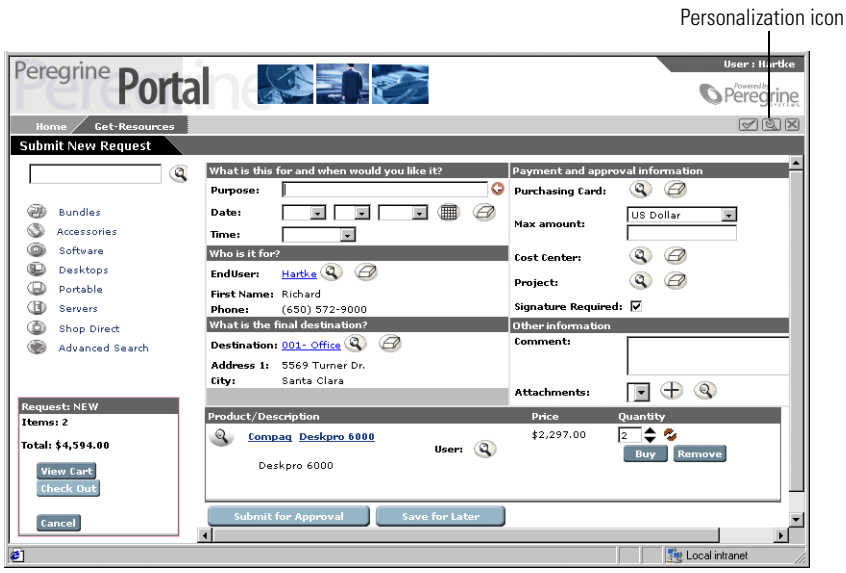
This maps personalization storage to the ACAdapter, causing the data to be stored in the AssetCenter database.

In AssetCenter, the schema is mapped to the amOption table, with an OptSection key of the form “personalize.” If you need to move personalization settings from one database to another, you can export these records from the amOption table and import them into the second system.

In ServiceCenter, the schema is mapped to the giComponentUsers table, with a corkboard.name key of the form “personalize”. If you need to move personalization settings from one database to another, unload these records and load them into the second system.

Using Personalization

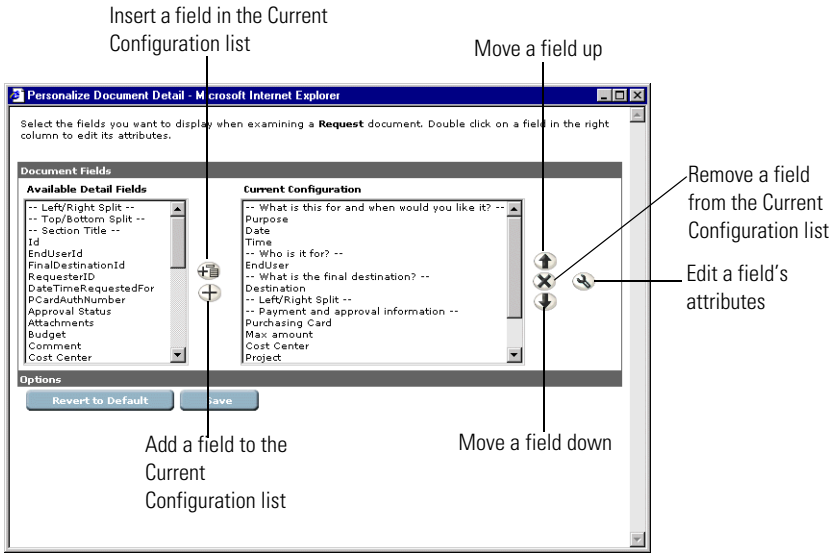
Personalization is available on forms that have a wrench icon in the upper right corner of the interface.



To personalize a form:

1 Click the wrench icon.

The Personalization edit window appears.

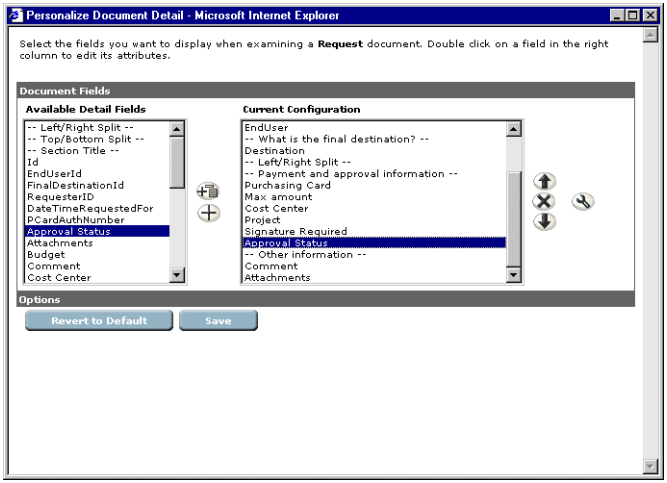


The Current Configuration column lists all the fields and components included on the current form.

2 In the **Available Detail Fields** column, select the field you want to add to the form, and then do one of the following:

- To insert a field in a particular location on the form, select the field immediately below the place where you want to insert the new field in the **Current Configuration** list, and then click **Insert**. The new field name appears above the selected field.
- To add a field to the bottom of the form, click **Add**. The field name appears at the bottom of the list.

The following screen shows the Approval Status field inserted in the *Payment and approval information* section.

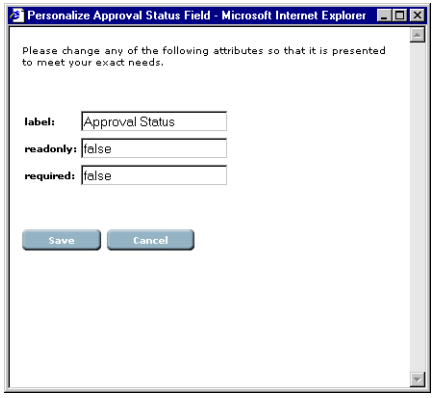


3 Further configure the field, if necessary, by doing any of the following:

- To move the field to a different location, click the **Move up** or **Move down** buttons.
- To remove a field from the **Current Configuration** list, select the field, and then click the **Remove** button.

4 To edit the attributes of a field, click the **Edit** button.

An edit window appears.



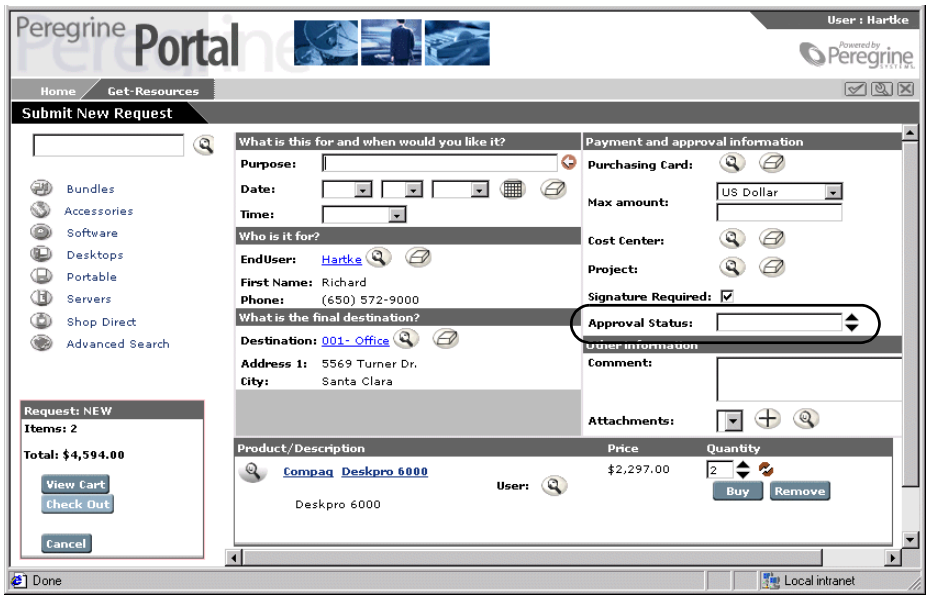
The following options are available:

- Change the label that will appear next to the field.
- Define the field as read only or writable.
- Designate the field as a required field.

5 Make your selections, and then click **Save**.

6 In the Personalize Document Detail window, click **Save** to apply your changes to the form.

The following screen shows a new Approval Status field displayed on the form.



7 If you want to return to the default configuration, click the wrench icon to display the personalization window, and then click **Revert to Default**.

CHAPTER 3

Using the Peregrine Portal

The Peregrine Portal provides access to Get-Resources. There are two ways to access Get-Resources:

- As an administrator
- As an end-user

This chapter discusses the features available with a user login. The administrator login is described in the chapter on Administration, beginning on page 21.

The Portal provides login screens for the administrator and user logins. The Portal also includes a Home page, which provides a Navigation menu, a left pane containing a list of activities, and buttons that enable you to customize your Portal and to end your session.

Note: Before you can log in to the portal, you need to configure Get-Resources to work with AssetCenter. For more information, refer to *Get-Resources with AssetCenter* on page 65

Logging in to Get-Resources

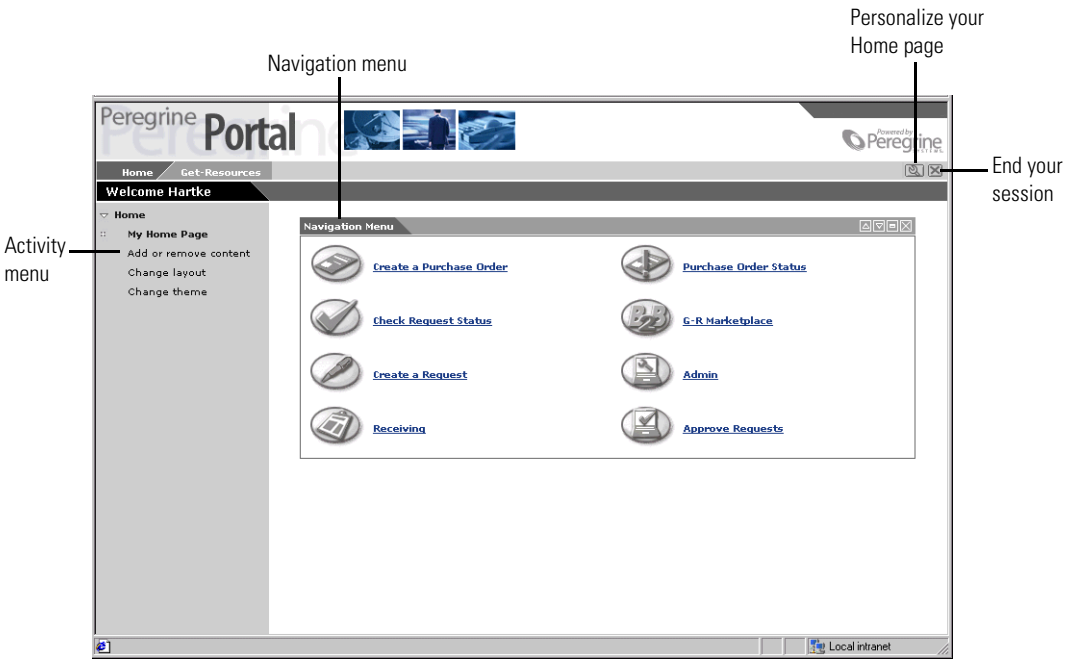
There are two login screens that provide access to Get-Resources:

- A user login screen—http://<*server*>/oaa/login.jsp
- An administrator login screen—http://<*server*>/oaa/admin.jsp

Logging In as a User

If the user has already been entered into the system, the user types a user name and password (if required), and then clicks the **Login** button. However, users can also self-register. Refer to page 42 for information about user registration.

The following screen shows the Get-Resources Portal.



Using the Left Pane

The left pane provides access to a number of tasks as you navigate through Get-Resources.

By default, the following menu items appear in the left pane:

- **My Home Page**—returns you to the Peregrine Portal Home page.
- **Add or remove content**—accesses the same form as the **Personalization** button, allowing you to customize your Home page.
- **Change layout**—enables you to change the location of a component or remove it from the Peregrine Portal.
- **Change theme**—enables you to select from several options: select an overall scheme for your pages, change the stylesheet, or change the skins.

Personalizing the Peregrine Portal

By default, the **Navigation Menu** appears on the Peregrine Portal. You can change the layout of the components or minimize a component to hide the component details.

Adding Portal Components

The following components are available:

Peregrine Portal Web Application Components

- Navigation Menu

Get-Resources Utilities

- Requests to Approve
- Status Review

Personal Utilities

- Calculator
- Calendar
- Skins and Styles
- Date and Time

The Calendar and Calculator require Microsoft Internet Explorer 5.0+ or Netscape 6.1+.

To add Portal components:

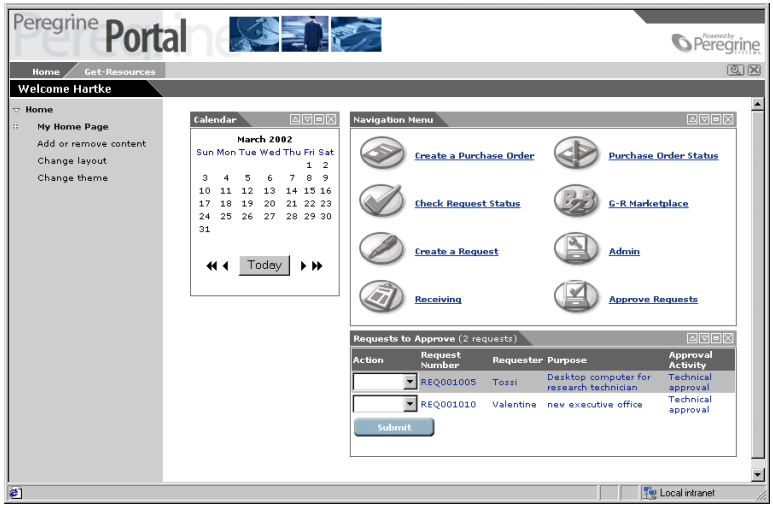
1 Click the **Personalize** button (wrench) on the upper right of the Home page.

The list of available components appears.

2 Select the components you want to add to your Portal.

3 When you have completed your selections, scroll to the bottom of the page, and then click **Save**. To return to the Portal without making any changes, click **Go Back**.

You are returned to the Portal with the new components displayed. The following example shows several options added to the Portal.

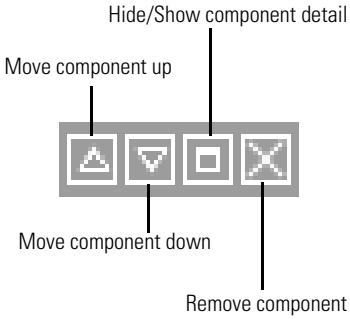


Changing the Layout

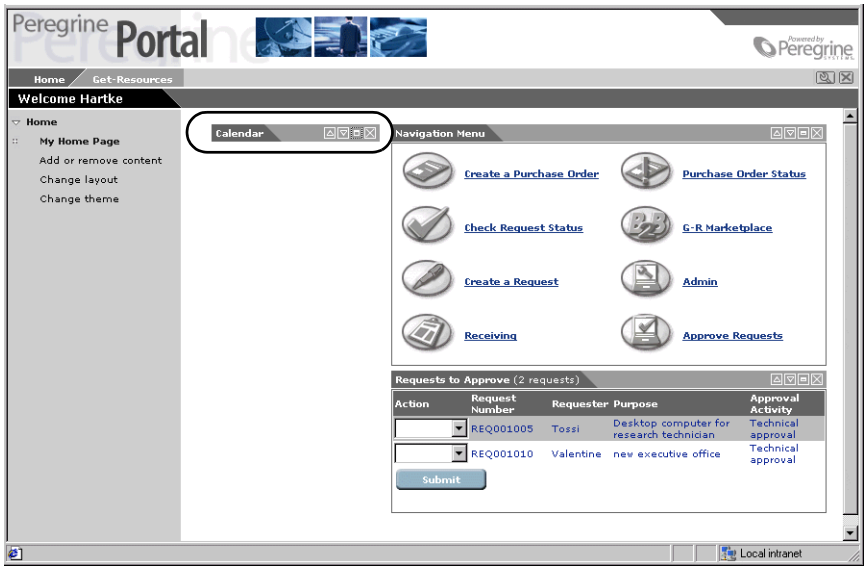
The following sections contain procedures for changing the location of the components or removing them from the Peregrine Portal. The procedure you use is determined by the Web browser you are using.

Microsoft Internet Explorer

If you are using Microsoft Internet Explorer as your Web browser, use the buttons in the upper right corner of each component to move the component up or down, remove the component, or hide/show the component detail.



In the following screen, the Calendar has been minimized. Click the Show Detail button to redisplay hidden component details.



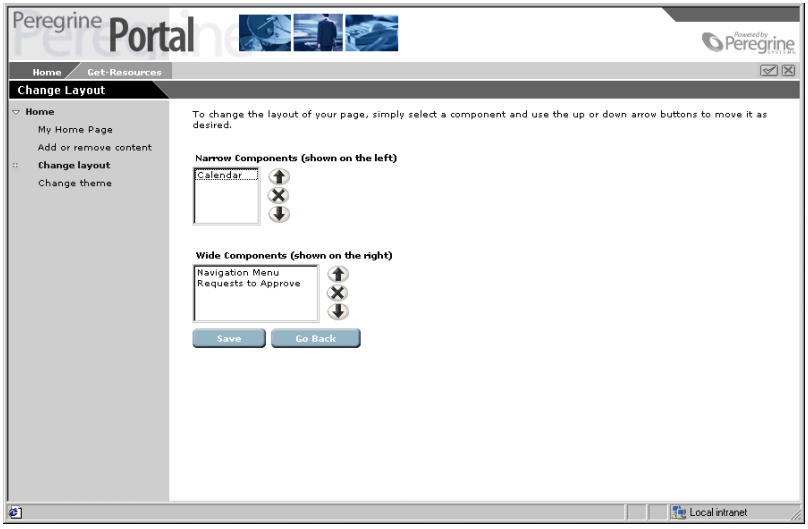
Netscape Navigator

If you are using Netscape Navigator as your Web browser, use the following procedure to change the status of the components on the Portal. You can move a component up or down, or remove the component.

1 In the left pane, select **Change layout**.

A form appears in which you can select the components you want to change.

Components can be Narrow (for example, Calendar or Calculator) and are located on the left side of the Peregrine Portal. Other components (for example, Top News) are Wide and are located on the right side of the Portal.



2 Select the component you want to modify, and then click the appropriate button to activate the change.

- Up arrow to move the component up.
- Down arrow to move the component down.
- X to remove the component from the Peregrine Portal.

3 Click **Save**.

Changing the Theme

Get-Resources ships with the Classic skin/style theme. Through tailoring, you can add more themes. Then, you can choose from the available skins and stylesheets to change the look of your Web pages. You can select a predesigned theme or mix and match portions of a theme.

The following options are available:

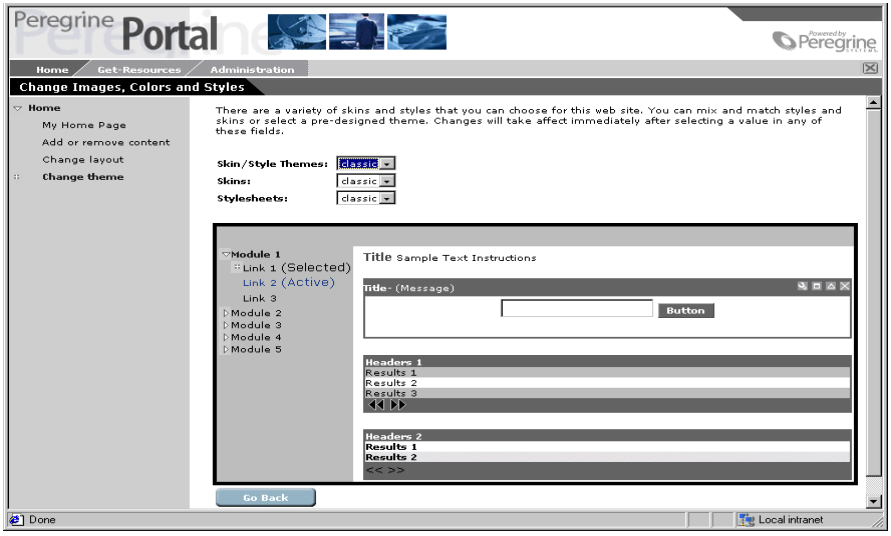
- Skin/Style Themes—this option changes both the skin and stylesheet. It provides a new banner at the top of the page and a new look to the left pane. The colors and icons for the Navigation Menu and the other Portal components also change.

- Skins—this option changes only the banner and left pane.
- Stylesheet—this option changes only the main Portal area, including the Navigation Menu and other Portal components.

To change the theme:

1 From the left pane on the Portal Home page, select **Change theme**.

The following form appears.



2 Choose from the drop-down lists provided.

As soon as you make your selection, the page updates to reflect your selection. The form below shows a Portal with the skin/style theme, sierra, selected.

This new configuration remains through subsequent work sessions until changed.

SECTION II

Get-Resources with AssetCenter

4 Configuring with AssetCenter

CHAPTER

This chapter includes instructions for configuring Get-Resources with an AssetCenter database:

- Configuring Get-Resources to use the AssetCenter demo database.
- Configuring Get-Resources to use an existing AssetCenter database.
- Identifying the back-end system version.
- Defining the database name using the Admin module.
- Configuring the Automatic PO Generation workflow.

This chapter also includes a summary of Get-Resources features and a workflow diagram.

Although the Get-Resources installation includes an AssetCenter demo database, you must install AsssetCenter separately. When you install AssetCenter, choose either a full AssetCenter installation or a custom installation, selecting the **AssetCenter API** option. Refer to your AssetCenter documentation for instructions.

Overview of Get-Resources Architecture

Get-Resources connects to the AssetCenter database through a special adapter, the ACAdapter. As requests are opened and processed through Get-Resources, data is stored and updated in the AssetCenter database.

Users are authenticated using AssetCenter Profiles, with special user rights provided for use with Get-Resources. For more information about user authentication, see *User Registration and Authentication* on page 79. The *Open Application Architecture Platform Administrator's Guide* also contains information about user authentication.

Configuring AssetCenter

Although Get-Resources is installed with all the proper connectivity to interface with AssetCenter, you need to configure Get-Resources to connect to the database you want to use, either the demo database provided with Get-Resources or your existing AssetCenter database.

There are several settings on the Admin module **Settings** page that are necessary to establish a connection between Get-Resources and AssetCenter:

On this tab...	In this field...	Specify...	Applies to...
AssetCenter	Database	The name of your AssetCenter database	Windows and UNIX
AssetCenter	AC Shared Library Name	libaamapi*41*.so (If you are not using AssetCenter version 4.1, replace 41 in the file name with the appropriate version of AssetCenter.)	UNIX
AssetCenter	AC Shared Library Path	/usr/local/AssetCenter/bin/	UNIX
Portal DB	Alias for	ac	Windows and UNIX
Web Application	Alias for	ac	Windows and UNIX

Configuring Get-Resources to use the Get-Resources AssetCenter Demo Database

The following steps must be completed to use the AssetCenter demo database shipped with Get-Resources:

- In AssetCenter, declare a new connection to the demo database. This configures a User DSN only.
- If your application server is configured to run as a service, set up a System DSN. This step is not necessary if you installed Tomcat with your Get-Resources installation.
- Test the connection by logging in to the database from AssetCenter.
- Use the Admin module to point Get-Resources to the database, as described on page 68, and define a user name and password.

Configuring Get-Resources to use an Existing AssetCenter Database

Configuring Get-Resources for an existing AssetCenter database includes the following steps:

- Use AssetCenter to connect to the database you want to use.
- Import new scripts supplied with the Get-Resources installation.
- Use the Admin module to point Get-Resources to the database and define a user name and password.

The scripts must be imported in a particular order, which is outlined in the procedure beginning on page 73. The next section includes tables that tell the location of the scripts and describes each script's function.

Descriptions of the Scripts

The two tables in this section include information about the AssetCenter scripts:

- The first table lists the import scripts by AssetCenter version and folder location.
- The second table gives detailed descriptions about the scripts and what function each performs.

The default path to these scripts is:
c:\jakarta-tomcat-3.2.4\webapps\oaa\WEB-INF\etc\<*language*>\ac3 or ac4

where <*language*> is the ID for the localized script. For example, **en** for English.

Note: If you are not using Tomcat for your application server, substitute the appropriate path for the application server you are using.

	Folder	Script
AssetCenter 3	*getit import*	feat.scr
		calcflds.scr
		profile.scr
		workflow.scr
		empldept.scr
	getit b2b import	feat.scr
		calcflds.scr
		profile.scr
		workflow.scr
AssetCenter 4	*essential*	essential.scr (includes calcflds.scr, feat.scr, and the same scripts for B2B). This file also imports the itemized list values used by Get-Resources for the request status.
	sample	profile.scr
		workflow.scr
	sample/b2b	profile.scr
		workflow.scr
	demo	empldept.scr

Script	Description
feat.scr	Features for table amEmployee; contains DelegatedApproverId and DelegatedApprExpiration scripts. These features delegate request approvals to a person given by DelegatedApproverId, until the date specified by DelegatedApprExpiration. Features for table amProduct include ManufacturerURL, a text-based feature containing the manufacturer's URL. Others include Architecture, Processor, ProcSpeed, RAM, and HDCapacity, used by the Description calculated field to enhance the product description, none of which are used directly by Get-Resources
calcflds.scr	Calculated field Description for the Product table. Gives a technical description for the product.
profile.scr	Imports Get-Resources user rights to control access to the screens. These include: getit.requester (access to the request) getit.advancedrequester getit.approver getit.receiver getit.pcardmanager getit.pcarduser getit.pcardbuyer The final user right, getit.receiver, imports three predefined user profiles. The user profiles and their user rights are: **getit.admin** = getit.admin + getit.requester + getit.advancedrequester + getit.approver + getit.receiver + getit.pcardmanager + getit.pcarduser + getit.buyer + getit.b2badmin + getit.shopdirect **getit.default** = getit.requester **getit.full** = getit.requester + getit.advancedrequester + getit.approver + getit.receiver + getit.pcardmanager + getit.pcarduser + getit.buyer + getit.b2badmin + getit.shopdirect This script is provided as an example of how profiles can be defined. You can modify this as needed.

Script	Description
workflow.scr	Imports necessary workflows to make Get-Resources work out-of-the-box. Listed in order of Reference, Name, and Description. BUNDLPO; Bundle Ordering; Workflow necessary to work with the bundles REQROUTE; Routing Request; Sample workflow that manages the full qualification of an off catalog request before it enters the approval cycle REQAPPR_GR; RequestApproval; Sample approval workflow. It is important to note that only the workflow with the REQAPPR_GR reference will be displayed in Get-Resources. REQSTATUS; Request Status; Workflow that, on fulfillment of the request, changes its status to "Received" for better Get-Resources visibility. The REQSTATUS script also imports three employee workgroups. These include: IT: Technical approvers group (any employee in this group can give a technical approval for a request, provided one has the getit.approver user right). Finance: Financial approvers group (any employee in this group can give a financial approval for a request, provided one has the getit.approver user right). Getit: Employees group that will qualify the off catalog request. **Note:** The off catalog request qualification must be performed in AssetCenter. There is no module for this task in Get-Resources. This script is provided as an example of how workflows can be defined. You can modify the workflows as needed. Refer to page 88 for more information about the AssetCenter workflows provided with Get-Resources.
empldept.scr	This script is optional and is considered demonstration data. It imports one employee per profile, as defined in the following. Valentine: Michael Valentine is a getit.admin. Hartke: Richard Hartke is a getit.full. Tossi: Michaela Tossi is a getit.default.

Importing the Scripts

This section leads you through the process of importing the new Get-Resources information into your existing AssetCenter database.

Import the scripts in the following order for your AssetCenter version:

AssetCenter 3:

- From the getit import folder, import the following in the order listed:
  - feat.scr
  - calcflds.scr
- From the getit b2b import folder, import the following in the order listed. These must be imported even if you are not using B2B functionality:
  - calcflds.scr
  - feat.scr
- From the getit import folder, import the following scripts in the order listed:
  - profile.scr
  - workflow.scr
  - empldept.scr

AssetCenter 4:

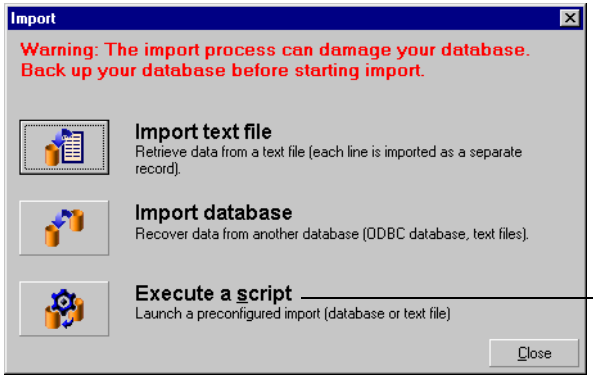
- From the essential folder, import the following:
  - essential.scr
- From the sample folder, import the following:
  - profile.scr
  - workflow.scr

  From the b2b sub-folder sample, import the following:
  - profile.scr
  - workflow.scr
- From the demo folder, import the following:
  - empldept.scr

To import the AssetCenter scripts:

1 Log on to AssetCenter.

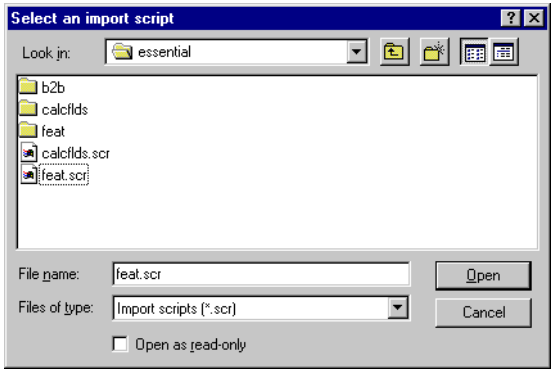
2 On the **File** menu, click **Import**.



Click the Execute a Script button to import the new database information.

3 Click **Execute a script**.

A dialog box appears in which you can browse to the location of the script you want to import.



The default location is `c:\jakarta-tomcat-3.2.4\webapps\oaa\WEB-INF\etc\`*`language`*`\ac3` or `ac4`, depending on the version of AssetCenter you are using.

4 Browse to the folder for the version of AssetCenter you are using.

5 Click on the script you want to import, and then click **Open**.

The path for the script you have chosen appears in the **Execute a Script** window.

6 Click **Import**.

7 Repeat this process until you have imported all of the scripts.

When the import is complete, you are ready to use the new information in the database. You do not need to restart AssetCenter.

8 Log on to AssetCenter and go to Tools >Workflow >Workflow schemes.

The Get-Resources imports included the Request approval workflow. Another workflow, Purchase request validation, may conflict with this new Get-Resources approval workflow. If the Purchase request validation workflow is present in your AssetCenter system, you must disable it as follows:

a From the list of Workflow schemes, select **Purchase request validation**.

b In the Validity section of the General tab, clear the Start field.

c In the End field enter a date in the past.

d Click **Modify** to save your changes.

9 In AssetCenter, verify that the User Profiles have been updated with the new Get-Resources options. The profiles should now include getit.default, getit.full, and getit.admin. The getit.buyer and getit.requester profiles are also offered out of the box.

Authorizing Access

If you have installed AssetCenter for the first time, log on to AssetCenter and enter your AssetCenter authorization code.

Note: If you do not enter an authorization code, Get-Resources will not be able to access AssetCenter. The DLL connection fails if an authorization code has not already been given for AssetCenter.

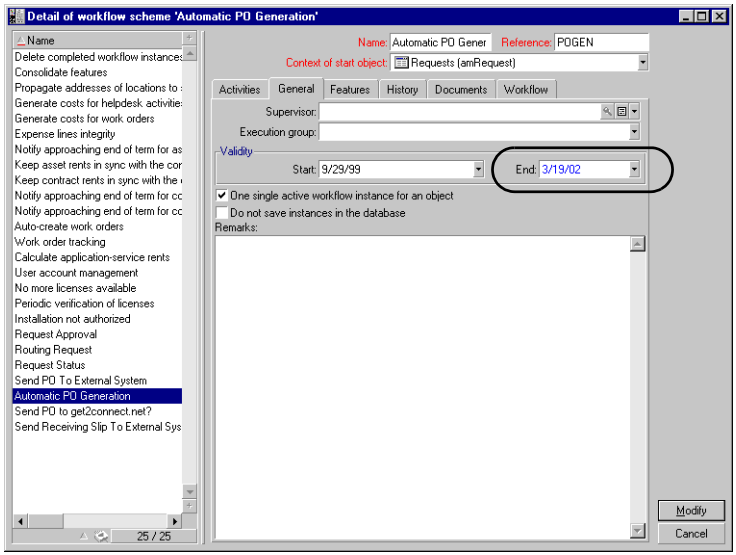
If Get-Resources and AssetCenter are installed on different servers, use the Admin module to establish the correct AssetCenter connection information.

Configuring the Purchase Order Generation Workflow

The Automatic PO Generation workflow in AssetCenter causes a purchase order to be created automatically each time a request is submitted in Get-Resources. You may want to disable this workflow in AssetCenter.

To disable the Automatic PO Generation workflow:

1. In AssetCenter, go to Tools>Workflow>Workflow Schemes.
2. From the list of Workflows, select Automatic PO Generation.
3. Select the General tab.
4. In the Validity section, End field, set the date to a time in the past.



5. Click **Modify**.
6. Restart your application server.

Troubleshooting the AssetCenter Database Connection

If you have trouble making a connection between Get-Resources and the AssetCenter database, verify the following:

1. Check the Control Panel page in the Admin module to confirm the database connectivity status.
2. If "ac" is disconnected, verify that the Database parameter defined on the AssetCenter tab of the **Admin Settings** page is the same as the database name displayed when you log in to AssetCenter. For example, in the system as shipped, the Database parameter on the AssetCenter tab is set to ACDemo351ENG.
3. Verify that all AssetCenter settings match Get-Resources settings. Log in to the AssetCenter database. Make sure that the login account referenced in the Get-Resources settings matches the login for AssetCenter. Also verify that Get-Resources is using the correct user name and password for the connection. You can do this by selecting **Manage Connections** from the **File** menu in AssetCenter.
4. Check the ODBC connections to AssetCenter. Depending on the way you run your application server, it looks for either an ODBC User DSN or an ODBC System DSN.
   - If you start your application server as a service (the usual method), it references the System DSN for the ODBC connection to the AssetCenter database.
   - If you start your application server as an application, it references the User DSN to determine the ODBC connection.

CHAPTER 5

Administration and Security

This chapter includes information about administrative tasks and security issues specific to Get-Resources when configured to use AssetCenter. Refer to the *Open Application Architecture Platform Administrator's Guide* for information about security at the platform level.

User Registration and Authentication

To access Get-Resources and the AssetCenter database, each user must have a Profile record established in AssetCenter. Specific Get-Resources user rights must be added to the user's AssetCenter profile in order to enable or restrict access to the various tasks available. For example, a user's profile could allow access to open requests, but not to approve them.

A user can also self-register if a profile has not previously been established in AssetCenter. When a user registers in Get-Resources for the first time, an amEmplDept record is created in AssetCenter. The user name and password are stored in the amDemplDept table and a default profile, *getit.default*, is assigned.

Each time the user attempts to log on to Get-Resources, the user name and password are validated against AssetCenter. If the entered user ID and password are not valid, the user is prompted to enter valid data. If the log on information is correct, Get-Resources retrieves the access rights for the user and logs the user on to Get-Resources.

User Rights

AssetCenter uses user rights to identify which tables an operator can modify within the system. User rights are grouped together in profiles. Individual employee records can have a single profile associated with them. Get-Resources examines the user rights of the logged-on user and provides access to the appropriate portions of Get-Resources. AssetCenter continues to restrict table access based on the detail of any given user rights record.

Setting User Rights with AssetCenter

Get-Resources uses an administration profile to connect to AssetCenter through the AssetCenter adapter. You can set the parameters, *acadmin* and *acadminpassword,* on the Admin module **Settings** page. This allows Get-Resources to connect to AssetCenter. User rights that are defined in AssetCenter are then used to determine which tables in AssetCenter a logged-on user can access and, therefore, which parts of Get-Resources the user can see.

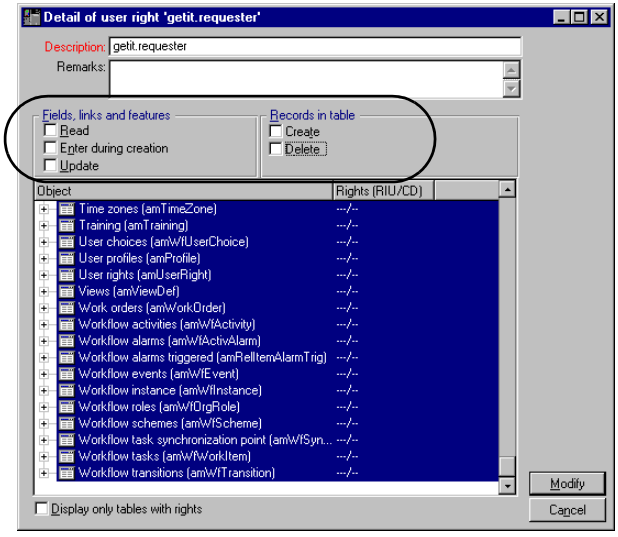
Get-Resources users must have a profile that has one or more of the following user rights keywords as appropriate:

User rights keywords	Access rights
getit.advancedrequester	Enables access to advanced request form features in Get-Resources, including the ability to split request lines and assign request line items to different end users. This is useful for requesters who typically request items for a group of people.
getit.requester	Enables access to create requests in Get-Resources.
getit.approver	Enables access to approve requests.
getit.receiver	Enables access to receive items associated with a request.

User rights keywords	Access rights
getit.b2badmin	Enables access to administer ShopDirect B2B connectivity.
getit.shopdirect	Enables access to perform ShopDirect sessions at supported vendor Web sites.
getit.shopdirect.[VENDOR]	Enables access to a specific vendor Web site.
getit.buyer	Enables user to create and change the status of purchase orders.
getit.pcardmanager	Enables users to create new Pcards and manage the rights for the Pcards they create.
getit.pcarduser	Gives the user access to Pcards on the request and purchase order screens. These fields do not appear if this access is not granted.

The AssetCenter demo database provided with Get-Resources assigns a number of access capabilities to the user rights used by Get-Resources. However, adminstrators can change these rights as necessary for users who need access to a standard AssetCenter client.

For instance, the getit.requester user right as shipped contains access to many AssetCenter tables. The sample screen below shows how these rights can be revoked to limit access to certain Get-Resources functionality. Refer to your AssetCenter documentation for more information.



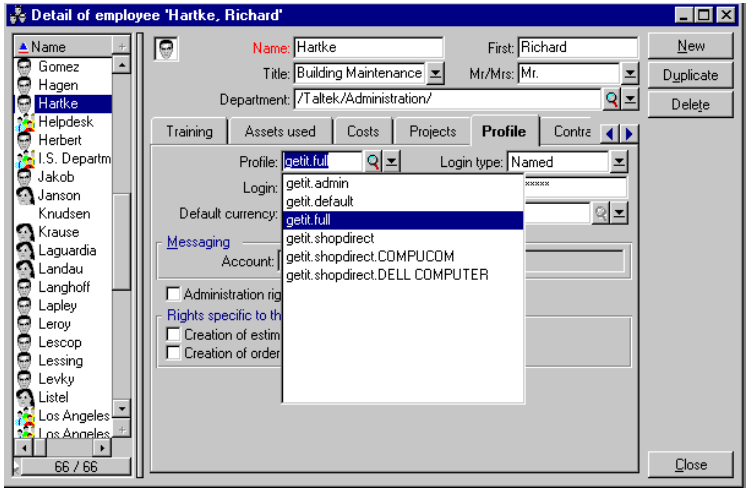
Sample Profiles

Get-Resources provides several pre-set sample profiles which combine user rights to give access to various modules. You can create profiles in AssetCenter with any combination of rights you want.

Get-Resources includes the following sample profiles:

Profile	Module you can Access
getit.admin	Administration, B2B Administration, Resources, Status, Approval, Receiving, Shop Direct, Pcard
getit.default	Resources, Status
getit.full	Resources, Status, Approval, Receiving, B2B Administration, ShopDirect, Pcard
getit.buyer	Purchasing, Pcard, Resources
getit.requester	Resources, Status, Pcard. This profile provides the minimum rights needed to complete a request.

When users first register, they are assigned *getit.default* authority. You can update the AssetCenter Employee records of those users who will need full or administration access.



If you want to add rights, it is better to create a new user profile in AssetCenter with the rights you want to grant to that profile.

6 CHAPTER Get-Resources Interface

This chapter includes information about the following:

- Logging in to Get-Resources as a sample user.
- An introduction to the interface.
- Information about the AssetCenter catalog and workflows.

Logging in using Get-Resources Sample Users

There are three sample users included with Get-Resources:

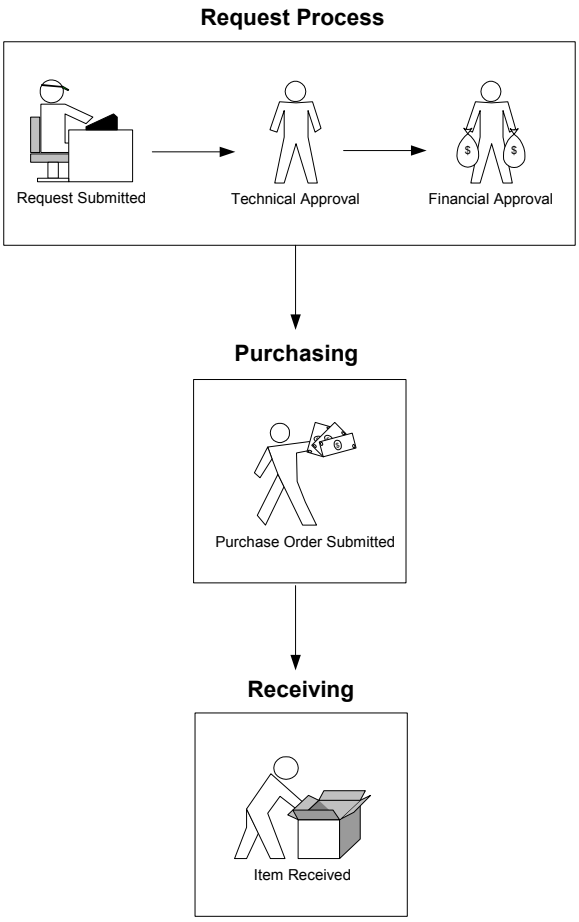
- Richard Hartke (user name: Hartke), with requesting, approving, receiving, and purchasing privileges.
- Michaela Tossi (user name: Tossi), an end-user with requesting capabilities only.
- Michael Valentine (user name: Valentine), with requesting, approving, receiving, purchasing, and administration privileges.

Each of these sample users has a profile defined in the AssetCenter demo database to illustrate various user access rights to Get-Resources. From each user's Profile tab, you can also view the accessible tables for that user. Refer to your AssetCenter documentation for instructions for viewing user rights and access to tables.

Get-Resources Features

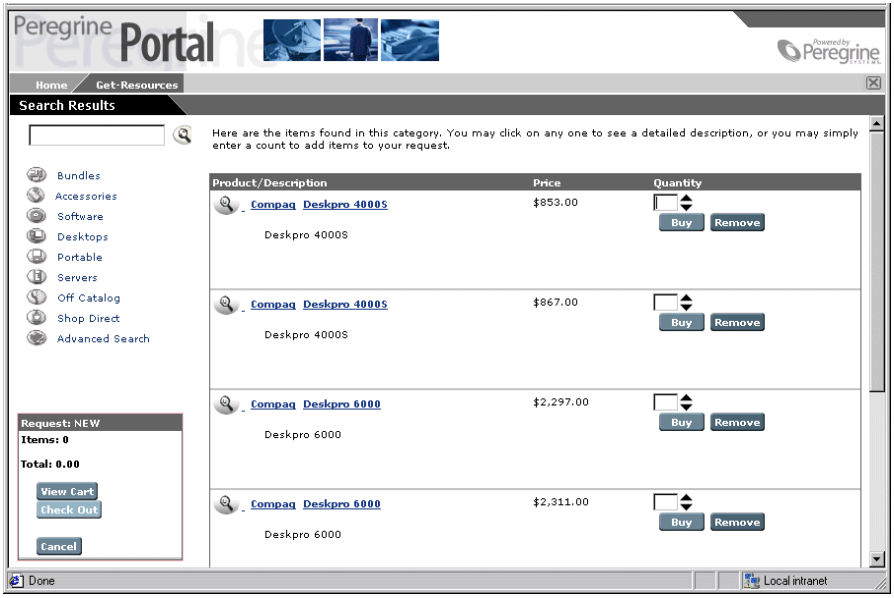
Get-Resources provides a comprehensive interface for processing a request for a product through an approval process, from opening a purchase order to the time the product is received. From the time a request is opened, you can follow the status of the request through animated workflows that are dynamically updated as the request moves through the approval process.

The following diagram shows the Get-Resources workflow when configured to use AssetCenter.



When a user starts the process of opening a request, a shopping cart is provided in which totals are dynamically updated as new items are added. Catalog items are displayed according to the category chosen by the user and as defined in the AssetCenter catalog.

The following form shows a typical catalog screen in Get-Resources. The sidebar displays all of the catalog options available, as well as the shopping cart.



AssetCenter Catalog

Get-Resources uses the AssetCenter product catalog contained within the amProduct table. There are two areas in the catalog that require special configuration:

- Certification field
- Calculated field

Certification

Get-Resources uses the Certification field to determine the availability of items in the AssetCenter catalog.

The buttons on the Catalog menu shown above each drive a database call against the amProduct table. The queries executed are similar to the following for Desktop Computers:

```
SELECT lProdId,Brand,Model,mPrice FROM amProduct WHERE (Certification LIKE 'Desktop%')
```

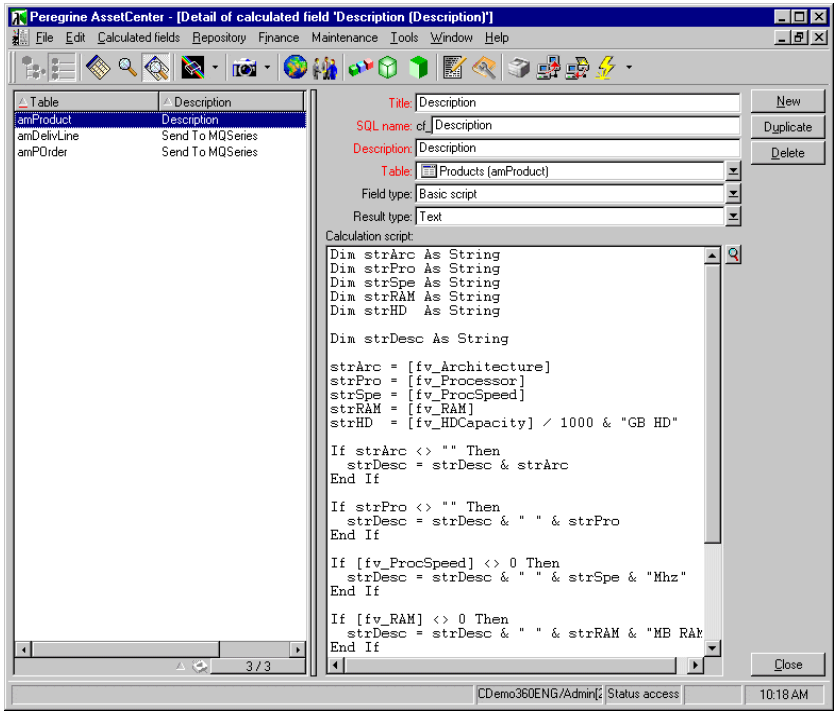
With the exception of the Bundle certification, all can be easily changed to meet your business requirements.

The Bundle certification is configured differently in Get-Resources. Bundles are groups of items tied together for a specific purpose. For example, a Sales Laptop Bundle might consist of a laptop, PCMCIA NIC, Operating System software, and some applications. This relationship is built within the amProdCompo table, tying together several records from the amProduct table. There is code in place within the procure.js script to give special treatment to Bundles.

Calculated Field: cf_Description

A calculated field is used as a descriptive name for records within the catalog. As identified in the Product schema, the Description field maps to the field cf_Description, a calculated field.

The following screen shows a sample of how AssetCenter's calculated fields can be used within Get-Resources to ease data presentation. Refer to your AssetCenter documentation for information about calculated fields.



AssetCenter Workflows

AssetCenter provides workflows to help you automate and formalize your business procedures. The following AssetCenter workflows are available for use with Get-Resources and are used by the system in this order:

- Bundle Ordering (AssetCenter 3.x only)
- Routing Request
- Request Approval
- Automatic PO Generation
- Request Status

Each of these workflows follows a default process established in AssetCenter for Get-Resources as shipped. You can modify the workflows to suit your business needs.

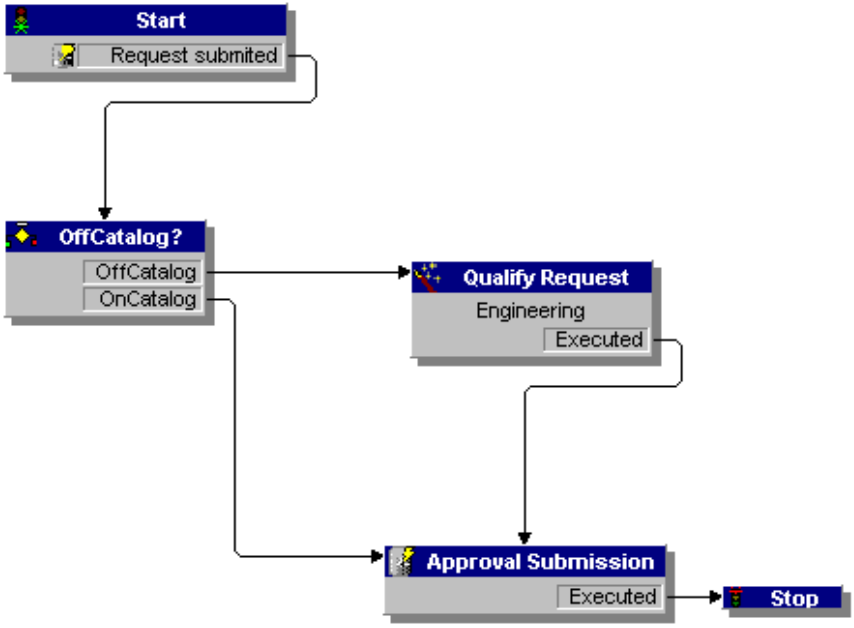
Note: It is important that you leave the first and last boxes in a workflow unchanged, since these boxes are linked to the workflows that precede and follow each workflow. Changing these boxes will break the links between the workflows and render them unworkable. Refer to your AssetCenter documentation for information on creating and modifying workflows.

Bundle Ordering Workflow

When a request is submitted, it is checked by the Bundle Ordering workflow to see if a bundle request has been submitted. If true, the workflow then removes the bundle from the purchase order part of the request process. This is done so that the individual items that make up the bundle will be processed through to the purchase order, rather than the bundle itself.

Routing Request Workflow

The Routing Request workflow is activated when the status of a request is set to *submit*. By default, all requests are processed as OnCatalog request, so the Qualify Request box is not used. The last box in this workflow starts the approval cycle.

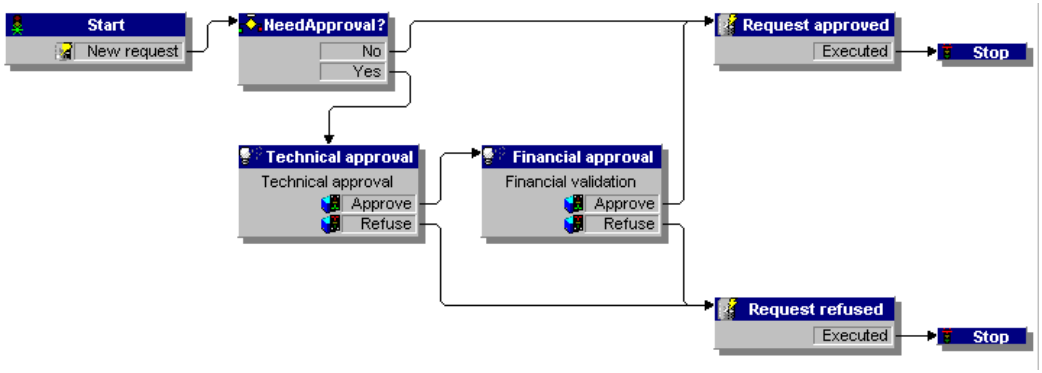


Request Approval Workflow

The Request Approval workflow shows the approval steps for a request that has been submitted. After the request has gone through the approval process, there are two possible results at the end of this workflow.

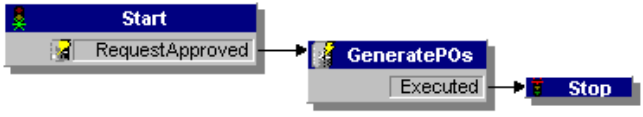
- If the request was approved, the approval status and the request status are set to *approved*. The request status determines what is displayed on the screen when the status of a request is viewed.
- If the request was not approved, the approval status and request status are set to *refused*.

If you change this workflow in AssetCenter, make sure you retain the first part of the reference field designation: REQAPPR_GR. Failure to do this will make it impossible for the system to process the workflow.



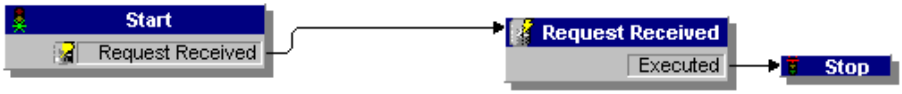
Automatic PO Generation Workflow

When the approval status of a request is changed to *approved*, the Automatic PO Generation workflow is activated. One purchase order per request is automatically created. You can change the process to create multiple POs by vendor or to have the system bundle several requests into one PO. If you do not want purchase orders to be generated automatically, refer to *Configuring the Purchase Order Generation Workflow* on page 76 for instructions for disabling this workflow.



Request Status Workflow

After ordered items are received, the Request Status workflow changes the status of the request to *received*. When the status of a request is viewed, the status is now shown as *received*.



SECTION III

B2B Server

CHAPTER 7 B2B Communication

Get-Resources offers several ways to manage the requisition and approval process. To get the most out of Get-Resources, you can use its B2B features to interact with Get2Connect.net, which is Peregrine's B2B solution, a system that creates a seamless pathway between your Get-Resources system and suppliers, regardless of which protocols the suppliers use.

This chapter discusses how B2B communication has evolved since the advent of the Internet and how Get2Connect.net uses the tools of B2B communication.

The Evolution of B2B communication

Business-to-business (B2B) communication uses computer software, server, and web-based technology to create pathways for companies to buy and sell items over the Internet. Basic B2B architecture uses clients with which end-users shop over the Internet, servers to store information about products and pricing, and protocols and scripts to send information between e-commerce sites.

The evolution of B2B communication has paralleled the evolution of the Internet. The first B2B sites were supplier-run sites that mimicked the business-to-consumer sites of today, such as Amazon.com. They used HTML to display information. No transaction documents, such as purchase orders, were sent across the Internet. Only purchasing professionals used the site to order supplies for their companies. And users typed the shipping and billing addresses, purchase order numbers, and other information into fields at the supplier site. In other words, such B2B sites offered no automated support for the buyers.

Next came sites that used application-service provider (ASP)-hosted, server-based applications which were designed to allow for online requisitioning, approval workflow, and reporting. Like the original B2B sites, the buyer had to enter addresses and purchase order numbers manually.

Today's B2B methods have automated the requisitioning and approval processes. The web-server-based procurement applications used for today's B2B transactions operate behind and across the security of buyers' and suppliers' firewalls. Catalogs, from which users shop, are either imported in bulk to the procurement application or they can integrate supplier-hosted Web pages into the end-user's requisitioning process.

What makes these transactions possible, of course, is the B2B network, such as Peregrine's Get2Connect.net or Ariba's Commerce Network Services. B2B networks use servers to authenticate transactions, alter document formats, and complete other tasks related to B2B communication. In other words, they relieve the buyer's procurement application of the burden of communicating with each supplier, which would entail using different protocols for each supplier. Instead, the procurement application uses a simple XML protocol to communicate with B2B networks, in particular Get2Connect.net.

Most buyers expect B2B communication to handle all transactions electronically, including the following:

- Sending and receiving purchase orders and confirmation for purchase orders
- Receiving notice of official acceptance or denial of a PO with a statement as to why
- Receiving shipment confirmation
- Receiving invoices

However, most suppliers cannot meet these demands on their own. In fact, some have more flexibility when it comes to older protocols, such as EDI, than XML. In this way, B2B networks act as intermediaries between the buyer's procurement application and supplier or market sites.

The B2B Process: An overview

The flow of the B2B process through Get2Connect.net depends on the choices your end-users make while shopping. If the user chooses an item from a catalog that you're hosting in AssetCenter (a buyer-hosted catalog), for example, the flow of documents and information is different than if the user chooses an item from a supplier that hosts their own catalog, a Peregrine-defined protocol known as *ShopDirect.* (For more information about ShopDirect, see *Understanding ShopDirect* on page 121.)

Catalog storage and access

Before users can shop online, catalog data must be available from which to shop. There are three ways to access catalog data: by viewing items on a supplier's ShopDirect site, by using Get-Resources to capture specific catalog items and store them in AssetCenter, or by downloading entire supplier-published catalogs into your database. The method by which you access catalog data depends on a supplier's capabilities. *Understanding Catalogs* on page 113 provides a thorough description of catalogs.

Item selection

When a user chooses an item from a catalog that you, the buyer, host, all transactions take place behind your firewall until the purchase order is generated and sent to Get2Connect.net. When the user selects an item from a supplier configured for ShopDirect, on the other hand, the following events occur:

Step 1 Get-Resources sends a request for the information about the catalog item to the supplier through Get2Connect.net.

Step 2 The supplier site authenticates your version of Get-Resources and redirects Get-Resources to the catalog page containing item information tailored to your organization.

Step 3 When the user checks out, the supplier information about the items in the user's shopping cart is sent to Get-Resources through Get2Connect.net.

Request approval and purchase order generation

Whether the user has chosen items from a buyer-hosted catalog stored in AssetCenter or a ShopDirect site, the process for request generation and approval is the same.

Step 1 Get-Resources generates a request and stores it in AssetCenter to await approval.

Step 2 Depending on how you've configured AssetCenter, the request is approved automatically through AssetCenter's workflows, or you approve it using Get-Resources to manage requests.

Step 3 AssetCenter generates a purchase order and queues it for transmittal to the supplier through Get2Connect.net.

Purchase order submittal and acceptance

Once a purchase order is approved, Get-Resources queues it for processing to the supplier through Get2Connect.net. Get-Resources uses automatic processes called scripts to send and retrieve waiting documents.

If the purchase order is successfully submitted, you'll receive one confirmation notice when Get2Connect.net receives the purchase order, and another confirmation when your supplier accepts it. (*Understanding Purchase Orders* on page 117 describes more about purchase orders.)

Invoicing and shipping

Get-Resources and Get2Connect.net use the same processes to receive invoices and shipping notifications as they do to process purchase orders. You can check the status of invoices and shipped items using Get-Resources. *Administering the B2B Site* on page 129 explains how.

Peregrine's B2B architecture

Peregrine's B2B system follows the standard B2B model just described. It has several components, some of which reside behind your firewall, and others that reside on Peregrine's B2B servers.

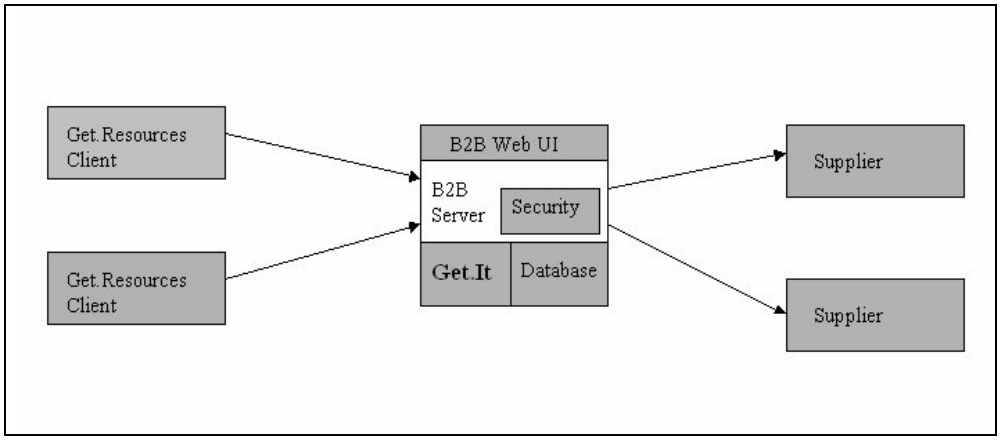
The core of Peregrine's B2B system is Get2Connect.net, a hub of technology through which you, the buyer, can interact with suppliers. Get2Connect.net acts as a bridge between your B2B Server and supplier sites. Get2Connect.net sends and receives documents such as purchase orders between Get-Resources and the supplier sites, translating the documents into the appropriate format for different suppliers as needed. Get2Connect.net uses the following technology:

- Supplier-hosted catalog protocols such as OBI, PunchOut, and RoundTrip
- Buyer-hosted catalog protocols such as Catalog Interchange Format (CIF), Catalog Update Package (CUP), and Peregrine's CatalogUpdates.xml format
- ServiceCenter and AssetCenter adapters to link Get-Resources to these back-end systems. Get2Connect.net uses a feature to open problem tickets if certain errors occur.
- Sophisticated B2B engines such as Power Enterprise and Extricity's Alliance

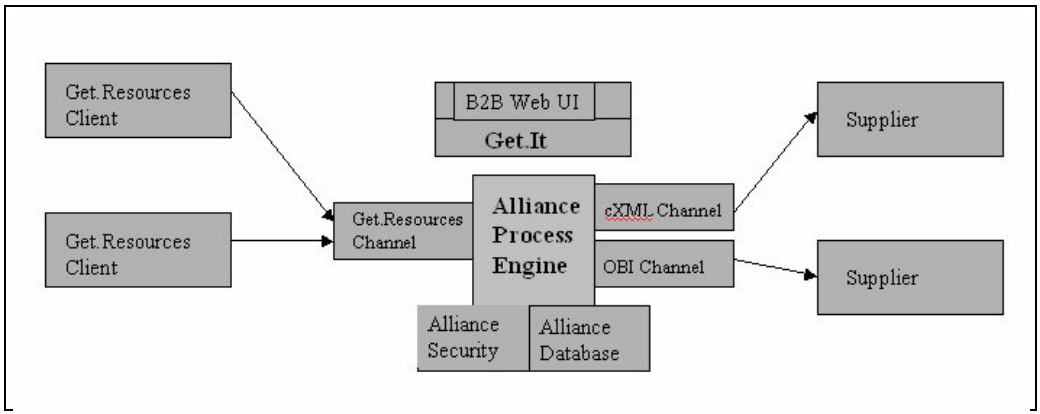
Get-Resources provides the front end for you to manage the processes of the B2B Server. Your end-users use Get-Resources to shop over the Internet or select items from within your stored catalogs. When they shop, they can either view and select from catalogs that are downloaded and stored into your AssetCenter database, in which case the shopper never ventures beyond your firewall. Or with ShopDirect permission, they can browse the sites of those suppliers who prefer to host their catalogs on their sites, a method known as ShopDirect. (*AssetCenter and Get-Resources* on page 105 describes how AssetCenter and Get-Resources work with Get2Connect.net in detail. *Understanding ShopDirect* on page 121 provides an overview of ShopDirect.)

The following image provides an overview of the B2B system.

B2B Server system, overview



The following image shows how the Alliance technology works beneath the B2B system.



AssetCenter and Get-Resources, two key applications in the B2B Server system, use the following building blocks:

- HTTPS, the secure form of Hypertext Transfer Protocol to send documents between the Get-Resources clients and the server
- XML, a document meta-language that puts structured data in a text file
- Web servers such as Apache, Netscape Enterprise Server, IIS, or the Java Web Server
- Common clients that provide the interface for Get2Connect.net, such as Web browsers, Palm Pilots, or mobile phones (through HDML)

CHAPTER 8 Configuring Get-Resources for B2B

After you install the B2B software and technology, you must configure Get-Resources so that it can interact with Get2Connect.net, Peregrine's B2B technology. (Get2Connect.net is described in the following chapter.)

To install the B2B Server software, refer to the *B2B Server 2.0 Installation and Administration Guide*.

Configuration of Get-Resources for B2B consists of one procedure: adding the URL of your B2B Server in the Get-Resources Administration settings. The B2B Server URL you enter identifies your system within Get2Connect.net and permits interaction with suppliers. This procedure is described below.

If you are adding your URL for the first time, see the section, *Adding your B2B Server URL for the first time*, next. If you are updating an existing B2B Server URL, see the procedure, *Updating your existing B2B Server URL* on page 104.

Adding your B2B Server URL for the first time

If you are setting up your B2B Server for the first time, use the following procedure to enter your B2B Server URL.

To add your new B2B URL:

1. Log in as an administrator to http://localhost/getit/admin.jsp.
2. In the left pane, click **Settings**.
3. Go to the B2B Server field and enter your B2BServer Host URL.

   An example of a B2B URL is: http://b2bserver.get2connect.net. Check with your Peregrine representative if you do not know your B2B server URL.
4. Scroll to the bottom of the page and click **Save**.
5. Reset the server.

Note: If you are doing an initial connection to Alliance-based B2B Server and you do not already have a Get-Resources partner created in Alliance, make sure that your Get-Resources instance does not have any legacy DUNS and password settings. To remove such settings, delete all entries in the B2B Settings section except the B2B Server field content.

Updating your existing B2B Server URL

If you have already entered a URL for your B2B Server and need to update it, use the following procedure.

To update your existing B2B Server URL:

1. Log in as an administrator to http://localhost/getit/admin.jsp.
2. In the left pane, click **Settings**.
3. In the B2B Server field, delete the existing B2B Host URL and enter your new one.

   An example of a B2B URL is: http://b2bserver.get2connect.net. Check with your Peregrine representative if you do not know your B2B server URL.
4. Scroll to the bottom of the page and click **Save**.
5. Reset the server.

CHAPTER 9 AssetCenter and Get-Resources

AssetCenter and Get-Resources provide the back end and browser functionality, respectively, for your B2B system. In addition to its asset management tasks, AssetCenter handles requests, approvals, purchase orders, and invoices that you use when interacting with suppliers through Get2Connect.net.

One function of Get-Resources is to act as the front end for AssetCenter's B2B components. Get-Resources communicates with suppliers through Get2Connect.net, permitting your end-users to browse supplier catalogs.

This chapter describes how AssetCenter and Get-Resources support the Get2Connect.net environment.

AssetCenter

To manage documents and processes associated with the B2B environment, AssetCenter uses scripts, workflows, and specific database fields. When you install and set up the B2B Server, these elements are imported automatically.

The following sections describe the scripts, workflows and database fields that apply to Get2Connect.net.

Scripts

Scripts import the data necessary for B2B processing into the AssetCenter database. There are five scripts that you must import into AssetCenter so your system can interact with Get2Connect.net:

- The script *Feat.scr* imports features that delegate approval requests to users who have designated approval status in AssetCenter.
- The script *Calcflds.scr* imports a product's technical information into AssetCenter. This information then appears in the end-user's product description field.
- The script *Profle.scr* imports user rights for Get-Resources pages. It imports the following user rights for Get-Resources:
  - getit.requester
  - getit.advanced requester
  - getit.approver
  - getit.asset
  - getit.assetrw
  - getit.receiver, which imports these user profiles: getit.admin for administrators, get.full with includes approval and ShopDirect rights, and getit.default, which is the basic end-user

    (For more information about the privileges assigned to these user rights, see *Descriptions of the Scripts* on page 69.
- The script *Workflow.scr* imports the workflows that Get-Resources requires to work out-of-the-box:
  - BUNDLPO - Bundle Ordering - Workflow needed to work with bundles

- REQROUTE - Routing Request - Sample workflow that manages full qualification of an off-catalog request before it enters the approval cycle
- REQAPPR - Request Approval - Sample approval workflow.
- REQSTATUS - Request Status - Workflow that, on fulfillment of the request, changes the request's status to Received.
- EMPLDEPTSCR - Employee Department- an optional script reserved for demonstration purposes. It imports one employee per profile.

- The script *Reqstatus.scr* imports three employee workgroups. These include:
  - IT: the technical approver's group. Any employee in this group can give a technical approval for a request, provided the employee has the getit.approver user right.
  - Finance: the financial approvers' group. Any employee in this group can give a financial approval for a request, provided the employee has the getit.approver user right.
  - Getit: Employee group allowed to make off-catalog requests. Off-catalog request qualification must take place in AssetCenter. There is no model for this task in Get-Resources.

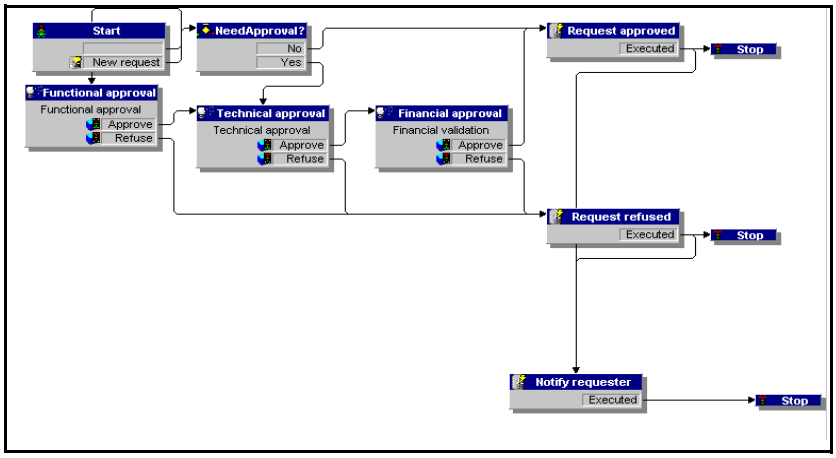
Workflows

Workflows automate business processes in AssetCenter. Each workflow consists of a task to be executed and events that trigger events to other activities. The following workflows relate specifically to Get2Connect.net. These workflows are imported into AssetCenter automatically when you install the B2B Server.

Important: If you choose to modify these workflows in AssetCenter, do not modify the Start or Stop events or the workflows will not longer work.

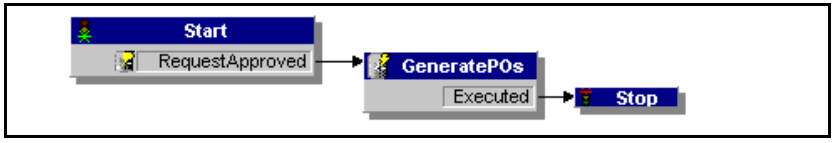
- RequestApproval, which determines the standard approval process for any purchase request. The following image shows the RequestApproval orkflow.

The Request Approval workflow



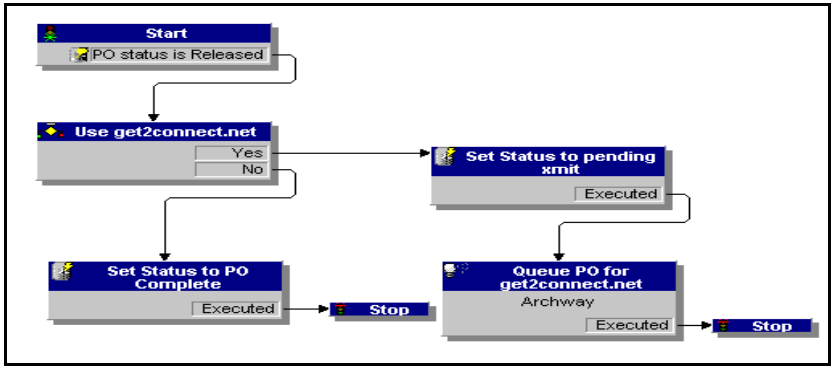
- Automatic PO Generation, which creates a purchase order when a request has been approved. The following image shows the Automatic Generatiworkflow.l

The Automatic PO Generation workflow



- Send PO to Get2Connect.net, which automates the process of using Get2Connect.net to place orders. The following image shows the Send PO to Get2Connect.net workflow.

The Send PO to Get2Connect.net workflow



Database fields

AssetCenter uses the following four database feature fields to work with the B2B environment.

- fv_DUNSnumber holds the DUNS number of the supplier as known by Get2Connect.net. This feature is populated automatically when any ShopDirect transactions occur at a supplier website.
- fv_useGet2Connect.net is a yes/no checkbox that allows you to specify if you want PO's to be sent to Get2Connect.net.
- fv_SupplierAuxiliaryPartNumber applies to the amProdSupp table and maintains any auxiliary supplier part number information. The auxiliary part number contains a supplier-generated "cookie" that contains a quote number or shopping basket identifier.
- fv_UNSPSC_code is a part of the amProduct table. It contains the UNSPSC category code for each supplier part.

Get-Resources and Get2Connect.net

All of your outgoing B2B documents, such as purchase orders, which are generated in AssetCenter and sent through Get-Resources, are in XML format. Because not all suppliers accept XML documents, Get2Connect.net translates the XML documents from Get-Resources into the format a supplier requires, such as OBI.

When suppliers send documents to you, those documents are in the format that the supplier uses. When the documents reach Get2Connect.net, Get2Connect.net converts the documents into XML so Get-Resources can read them. These documents include invoices, purchase order acknowledgements, and catalog updates.

Get2Connect.net and Get-Resources use scriptpolling to automate document transfer and translation. The scriptpolling feature uses scripts, which are automated tasks that send and retrieve documents. For our purposes, however, only the Get-Resources scripts are discussed here.

The following Get-Resources scripts affect Get2Connect.net functionality.

- Pactask2qdoc queues approved purchase orders for transmittal to Get2Connect.net.

- SendB2Bpo sends queued purchase orders to Get2Connect.net for processing.
- ProcessCatalogUpdates processes any waiting Catalog Update XML documents and inserts the information into the AssetCenter database.
- ProcessInvoices processes any waiting invoices and updates the invoice in AssetCenter.
- GetWaitingDocs retrieves documents, such as purchase order status updates and invoices, that are waiting at Get2Connect.net.
- ProcessPOStatus checks Get2Connect.net for and retrieves purchase order acknowledgements.

Access rights

Get-Resources is designed so that users can register on-line, eliminating the need for a system administrator to respond to every request for access.

When a user attempts to log on to Get-Resources, the user name and password he or she enters are validated against the AssetCenter profiles. AssetCenter relies on user rights profiles to identify which tasks a user can perform with Get-Resources. Profiles group user rights together. Get-Resources examines the name of the user right that an individual has, and uses it to provide access to various portions of the Get-Resources. For example, only users with the profile getit.ShopDirect can use ShopDirect. The following user rights have been established for use with Get2Connect.net:

User Right	Module
getit.b2badmin	B2B Administration
getit.ShopDirect	ShopDirect access in Get-Resources
getit.ShopDirect.suppliername	ShopDirect access to specific suppliers

Security

All B2B communications are automatically encrypted using Secure Sockets Layer (SSL), which is the standard encryption mechanism for HTTP. It is accessed by Get2Connect.net.

SSL is used for the following:

- all communication between your Get-Resources web server and Get2Connect.net
- all communication between Get2Connect.net and suppliers.
- all communication between Get2Connect.net and the Get2Connect.net pipeline server (which is the interface for sending and receiving EDI)

Peregrine also requires you to select a user ID and password when you register with Get2Connect.net. The user ID and password are stored in encrypted form on your Get-Resources web server, are included in the encrypted messages sent to Get2Connect.net, and are checked at Get2Connect.net before honoring any request.

You are responsible for the following:

- setting up end-user accounts/privilege levels
- restricting access, both by user ID/password from a browser, and direct physical access, to your Get-Resources web server, and its file system
- ensuring that preparation and approval of a purchase order cannot be done by unauthorized individuals
- setting a dollar amount limit on requests that will receive automatic approval

10 CHAPTER Understanding Catalogs

Catalogs are a collection of information about items from a supplier. Suppliers provide the following information about each item in their catalogs:

- manufacturer part number
- supplier part number (this number is different from the manufacturer part number only if the supplier is the reseller and not the manufacturer)
- item description
- ID number of the supplier
- price of the item

Catalogs take two forms: supplier-hosted and buyer-hosted. You, as a buyer, can use either the supplier-hosted or the buyer-hosted catalog method to shop for and purchase items through Get2Connect.net. The following sections describe each method in detail.

Supplier-hosted catalogs

Some suppliers prefer to host their catalogs on their Web sites. Supplier-hosted catalogs offer the advantage of more accurate pricing and availability because the information comes immediately from the supplier's site. Also, catalog data isn't downloaded until the end user chooses an item for purchase. Then only information about that item is imported into the AssetCenter database.

Suppliers use one of several methods to host their own catalogs and permit B2B transactions:

- OBI (Open Buying on the Internet) was developed by the Open Buying on the Internet Consortium.
- OCI (Open Catalog Interface) was developed by SAP. Originally an HTML-based method for communication between the supplier site and procurement application behind a buyer's firewall, OCI now uses XML.
- PunchOut is part of the cXML protocol that Ariba developed.
- RoundTrip was developed by CommerceOne. Although CommerceOne based RoundTrip originally on CBL, the organization redesigned it to be OCI-compatible to accommodate the partnership between SAP and CommerceOne.

Get2Connect.net uses ShopDirect, a Peregrine-designed protocol, to normalize all of these protocols into a common set of XML interactions. So, although other B2B networks, such as Ariba, can interact with suppliers who use their protocol only, Get2Connect.net permits Get-Resources to interact with suppliers regardless of the protocol the supplier uses.

Supplier-hosted catalogs have advantages and disadvantages, which the following table describes.

Advantages	Disadvantages
Supplier maintains catalog information.	Supplier-site performance affects end-user's ability to shop.

Advantages	Disadvantages
Users have a richer shopping experience.	Buyers can't control what end-users see on supplier site.
Built-in configuration and pricing tools mean that suppliers can maintain complex products easily.	Buyers or end-users can't do side-by-side item comparison between suppliers.

Buyer-hosted catalogs

Some suppliers permit system administrators to download their catalog data and store it within the buyer's database. These types of catalogs are called buyer-hosted catalogs. As a system administrator, you can either capture specific catalog items or use server scripts to download a supplier's published catalog. (Contact your Peregrine representative for more information.) Once you've downloaded catalog data, you can categorize it and store it in your AssetCenter database, and end-users access the catalog data using Get-Resources. There are advantages and disadvantages to using buyer-hosted catalogs, as the following table shows.

Advantages	Disadvantages
Because shopping occurs behind the buyer's firewall, the performance of a supplier's site does not influence the user's ability to shop.	Buyers must expend much effort to maintain catalog information.
End-users see the same interface each time they shop.	Buyer-hosted catalogs cannot support items that have lots of options or are highly configurable.
Buyers can control which items users see and purchase.	Some suppliers refuse to publish catalogs in bulk, forcing buyers to go to the supplier's site to shop.

Buyer-hosted catalogs use one of the following protocols:

- CIF, or Catalog Interchange Format, which Ariba invented
- CUP, or Catalog Update Package, which CommerceOne invented

- CatalogUpates.xml, which Peregrine invented

Get2Connect.net normalizes all these formats so that Get-Resources can acquire buyer-hosted catalogs and store them in AssetCenter.

There are two ways to download catalogs: The Capture Catalog method, and the Server Scripts method.

Note: Downloading and supporting catalogs in the Get2Connect.net environment requires assistance from Peregrine's Professional Services Group.

Capture Catalog Items method

As stated in the previous section, some suppliers insist on retaining their catalogs on their site alone. Yet not all buyers want to allow end-users to interact with supplier sites directly. If that's your preference, you might want to use the capture catalog items method to limit the items your end-users can choose from. To do so, you will use Get-Resources' Capture Catalogs function to browse supplier sites, capture items, and import them into your AssetCenter database. (*Administering the B2B Site* on page 129 explains how.)

Server Scripts method

Some suppliers publish their catalogs in a format that Get2Connect.net can read and import into your AssetCenter database. Peregrine forms an agreement with these suppliers so that their data is available in one of the following formats:

- Catalog Interchange File (CIF)
- delimited flat files, such as ASCII, Excel, Access, dBASE, or Lotus 1-2-3
- Catalog Update Package (CUP)

Get-Resources and Get2Connect.net use scriptpolling to retrieve catalog files automatically.

For more information about dowloading catalogs using the server scripts method, contact your Peregrine representative.

11 CHAPTER Understanding Purchase Orders

When an end-user selects an item for purchase, Get-Resources generates a request, which is then stored in AssetCenter. Once the request has been approved, a purchase order is generated in AssetCenter and routed to the supplier through Get2Connect.net. (For the workflows and scripts responsible for automatic generation of purchase orders, see *AssetCenter and Get-Resources* on page 105.) *Administering the B2B Site* on page 129 explains how to view and manage purchase orders. This chapter explains what happens in the purchase order generation and delivery process.

Processing

Each purchase order contains a request number and an AssetCenter-generated customer purchase order number. Get2Connect.net reformats the PO from the AssetCenter format to the format that the supplier requires. Here's how PO processing works.

First, AssetCenter generates the purchase order and queues it for transmittal to Get2Connect.net. Before the PO is sent, Get-Resources validates that the PO is correct and complete. (The following section, "Validation," explains what constitutes a correct and complete PO.) When the purchase order is sent to Get2Connect.net, Get2Connect.net forwards the PO to the supplier, and one of several status messages is returned. The status message will reflect the PO's transmittal to Get2Connect.net or to the supplier. (For more information about PO status, see the section, "Status," in this chapter.)

Depending on the supplier's capabilities, Get2Connect.net will e-mail, fax, or send the PO to the supplier electronically.

Validation

Get-Resources validates a PO before transmitting it to Get2Connect.net by verifying that the PO contains the following information:

- a PO field that is not blank or null
- at least one line item
- a supplier name
- a supplier DUNS number
- a request number
- a requester name
- a Ship To address
- a Bill To address
- a supplier part number for each line
- quantity, price and total numbers
- a total amount that equals the quantity times the price for each line item
- a unit of measure code for each line
- a total value of the PO that equals the sum of all line item values

If Get-Resources cannot validate the PO using this criteria, the PO is not sent and the status for that PO becomes, "Purchase Order Incomplete, not sent." The section, "Status," later in this chapter, describes all possible PO statuses. To learn how to check the status of PO, see *Administering the B2B Site* on page 129.

Transmittal

Purchase order transmittal takes into account the following issues:

- document format
- transmittal method
- queuing and sending processes

Document format

All purchase orders that AssetCenter generates and Get-Resources transmits are in XML format. Once the PO has been validated, Get-Resources will transmit the PO to the supplier through Get2Connect.net. Because many suppliers require POs that use a format different from XML, such as OBI or EDI 850, Get2Connect.net translates the XML PO into the format that a certain supplier requires.

Transmittal method

Get2Connect.net uses HTTPS to receive the document. HTTPS is the secure version of HyperText Transfer Protocol, the protocol that browsers use to display information. However, depending on the supplier's capabilities, Get2Connect.net might use E-mail, FTP, or fax to send the PO to the supplier.

Queueing and sending processes

Get-Resources uses scriptpolling to queue and send documents such as POs through Get2Connect.net. Scriptpolling runs processes to send documents to and retrieve documents from Get2Connect.net in batches. For example, the script *getwaitingdocs* periodically polls and retrieves XML documents that are waiting at Get2Connect.net.

Status

Once the PO has been submitted to Get2Connect.net, a status update is returned to Get-Resources. The following table shows possible PO statuses. (To learn how to check PO status through Get-Resources, see *Administering the B2B Site* on page 129.)

This message...	Reflects this status...
Purchase Order Incomplete. Not sent	The PO was not filled in completely or Get-Resources was not configured properly.
Pending xmit to Get2Connect.net	The PO is awaiting transmittal to the supplier.
Error transmitting to Get2Connect.net	There is a problem with the network connection. The transmittal will run again.
Accepted by Get2Connect.net	The PO is queued in Get2Connect.net and will be transmitted to the supplier soon.
Successfully transmitted to the supplier.	The supplier has received the PO and notified Get2Connect.net. This message does not mean that the supplier has agreed to honor the PO.
Difficulty reaching supplier, still trying	The web server for the supplier cannot be reached, or the fax number is busy. Get2Connect.net will try to reach the supplier for 24 hours before canceling the transmission.
Transmission failed--[reason here]	A transmission error occurred. The reason attached might be generated by the supplier if the supplier received but rejected the document.
Accepted by supplier	The supplier has accepted the PO and returned an acceptance statement to Get2Connect.net. This is your confirmation that the supplier will honor the PO.

12 CHAPTER Understanding ShopDirect

ShopDirect is the process of using Get-Resources to connect to a supplier's site, selecting products for purchase, and generating a request from the supplier site that triggers approval and purchase-order generation in AssetCenter. Because some suppliers don't permit buyers to download their catalogs, ShopDirect is the only method with which to purchase items from certain suppliers.

ShopDirect is the Peregrine-defined procurement method, but it is also a Get2Connect.net protocol, or a series of actions that permit transactions between buyers and certain suppliers. This chapter explains the ShopDirect process.

Why ShopDirect?

Some suppliers prefer to retain total control of their catalog data. These suppliers can form ShopDirect agreements with Peregrine and Get2Connect.net for buyers to connect to and peruse their catalogs online. The suppliers can even tailor their catalogs to a certain buyer, by offering customer-specific items and pricing or discounts on certain items, for example.

Requirements

The ShopDirect method requires a buyer with Internet access and a procurement application (such as Get-Resources). It also requires a B2B hub like Get2Connect.net to transfer data and translate documents into the formats that the suppliers and the buyer's procurement application requires. Finally, it requires a supplier who has enabled its site to accommodate shopping online.

The ShopDirect process

The ShopDirect process involves several phases. Here's an overview.

First, Peregrine must contract a supplier with ShopDirect capabilities to work with Get2Connect.net. In the process, Peregrine makes sure that Get2Connect.net can accommodate the supplier's technology. Because Get2Connect.net adapts to many technologies, this is usually a formality.

Note: If you want to use a ShopDirect supplier with which Peregrine has not formed an agreement, you can use Get-Resources to request that Peregrine contract the supplier. See *Administering the B2B Site* on page 129 for details.

Once Peregrine has contracted the supplier to work with Get2Connect.net (your Peregrine representative can provide a list of such suppliers), you must contact the supplier to complete the supplier's required paperwork to use B2B services.

Next, you must configure Get-Resources to work with that supplier. You can do this by using the B2B functions of Get-Resources to configure your site to link to the supplier's site. Usually this process involves simply entering the user ID, password, and any supplier-specific information (such as MPID) that the supplier provides, which Get2Connect.net will pass to the supplier when your end-users use ShopDirect. For the procedure on configuring suppliers, see *Administering the B2B Site* on page 129.

A Typical ShopDirect session

Once you've configured the supplier for Get-Resources, you or your end-users can access the ShopDirect site and request items. Here is an overview of actions that occur during a ShopDirect session:

Step 1 The end-user opens Get-Resources and chooses a ShopDirect supplier through Get-Resources, which interacts with Get2Connect.net.

Step 2 Get2Connect passes your identification information to the supplier.

Step 3 The supplier populates the ShopDirect site with either the catalog that they've tailored to your organization, or with their standard catalog.

Step 4 The end-user chooses items, which are added to a virtual shopping cart, and then clicks an icon to end the shopping session. (ShopDirect supplier sites are often called "punchout" sites because the shopper uses a shopping cart and then "punches out," or checks out at the end of the shopping session.)

Step 5 The catalog information for the items the user has chosen, including manufacturer number, price, and description, is transported back to AssetCenter through Get2Connect.net and Get-Resources.

Step 6 The approval process begins for the request. If approved, the request becomes a purchase order, and the purchase order is sent to the supplier.

Step 7 The supplier acknowledges and then accepts the order, sending notification of each action to Get2Connect.net, which transports the information back to you.

Step 8 The supplier fulfills the order and ships the items, sending notification to your system through Get2Connect.net as needed.

Note: If you prefer that your end-users never move beyond your firewalls to shop, you can capture and download catalog items from ShopDirect sites to store in AssetCenter. To learn how, contact your Peregrine representative.

13 CHAPTER Setting Up the B2B Environment

To set up your connection to the Get-Resources B2B services, you need to complete two procedures. These procedures are described later in this chapter. First, make sure you have completed these tasks before reading on.

- Install Get-Resources.
- Form an agreement with Peregrine to use the B2B module of Get-Resources and complete the necessary paperwork.
- Identify the suppliers with whom you'd like to interact. (Your Peregrine representative can help you determine the best suppliers for your needs.)
- Contact your chosen suppliers and form an agreement with them. Once you've completed the appropriate paperwork, the suppliers will provide your user ID, password, and supplier-specific information, such as the MPID number. (Here again, your Peregrine representative can help.)

This chapter contains directions for the remainder of required tasks for setting up your connection to Get-Resources B2B Services.

- To register with Get-Resources B2B Services, see page 126.

- To set the billing address and contact information that suppliers will use, see page 127.

Note: The interface you see as you work through these procedures might vary depending on which version of Get-Resources you have.

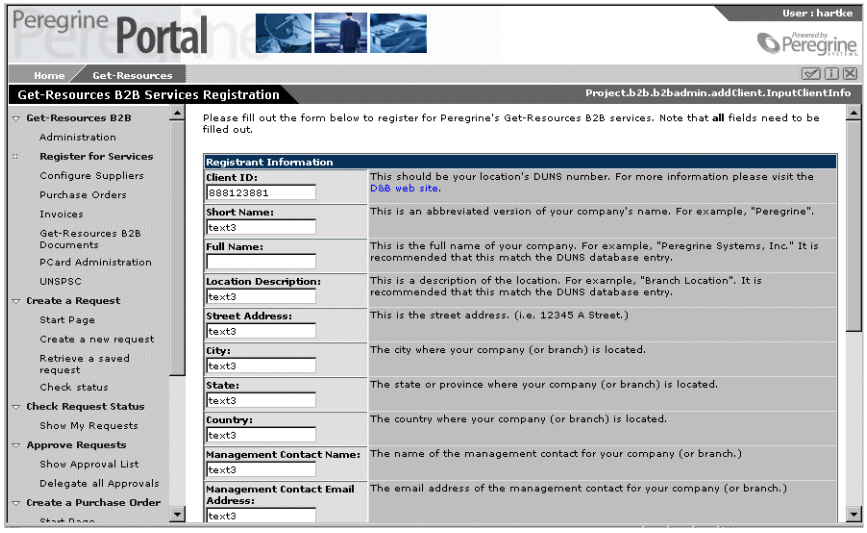
Registering with Get-Resources B2B Services

Once you've entered your URL from Peregrine, you can register your system with Get-Resources B2B Services.

1. Log in to Get-Resources using the **Login** page with Administrator rights.
2. From the Get-Resources Home page, click the **Get-Resources B2B** icon.
3. Under **Get-Resources B2B** in the left pane, click **Register for Services**.

   The **Get-Resources B2B Services Registration** page appears. A portion of this page is shown here.

You can register for B2B services using this page.



4. Complete the fields in this page and then click **Save**.

   The following message appears: "You have successfully registered for B2B services. You should now run the Configure Get-Resources B2B Suppliers application."

   To configure suppliers now, go to *Administering the B2B Site* on page 129. To add billing or contact information, go to the next section.

Setting billing address and contact information

You can update your default billing address and contact information, which are sent to suppliers, through Get-Resources.

To set or change your billing address:

1 From the Get-Resources Home page, click the Get-Resources B2B icon.

The **Billing Settings** page that appears shows the current default billing address and contact information. If you have not chosen a billing address or contact, no information appears here.

2 To add or change the billing address, click the Magnifying Glass icon next to the Location field.

A **Lookup** page opens, showing search fields and a list of available locations.

3 Enter an address, or choose a site or city, and then click Search.

A list of locations from the AssetCenter database appears.

4 Click the location you want from the list.

The **Search** page closes and your location appears in the Default Billing Address fields.

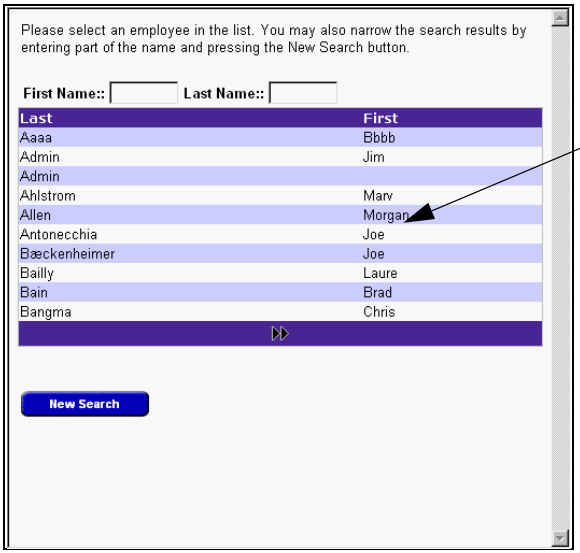
To choose or change a contact:

1 From the Get-Resources Home page, click the B2B icon.

The **Billing Settings** page that opens shows the current default billing address and contact information. If you have not chosen a billing address or contact, no information appears here.

2 Click the Magnifying Glass icon next to the Contact field. You'll use the Employee Lookup feature to find your contact.

The **Employee Lookup** page that opens shows a list of available contacts, as shown here.



The Employee Lookup page shows the contacts that you can select.

3 Choose a name from the list, or enter the person's first or last name in the search fields, and then click Search.

If you select a person from the list, the **Employee Lookup** window closes and the contact information appears in the Contact fields.

4 If you've searched for someone, click the person's name in the search results list.

The contact information appears in the Contact fields.

5 On the **Billing Settings** page, click the Submit button to update the information, and then click the Home button to return to the Home page.

14 CHAPTER Administering the B2B Site

You can manage your site entirely from Get-Resources. This chapter explains how to do the following:

- To configure access to suppliers, see page 130.
- To change passwords for or delete access to supplier sites, see page 130.
- To request that Peregrine add a supplier to Get-Resources B2B Services, see page 132.
- To capture and download catalog items, see page 133.
- To check purchase order status and see a purchase order in detail, see page 135.
- To track other documents, including invoices and PO status notifications, see page 137.
- To set and change the billing address and contact information that suppliers use, see *Setting Up the B2B Environment* on page 125.

Configuring suppliers for ShopDirect

Once you've registered for B2B services and formed agreements with suppliers, you can add those suppliers to your available ShopDirect sites. The suppliers you can select are suppliers that Peregrine has enabled to work with the Get-Resouces B2B environment. (To be able to use a supplier that Peregrine hasn't integrated, you must submit a request to Peregrine. Use the steps on page 132 to learn how.)

Note: The interface you see as you work through these procedures might vary depending on which version of Get-Resources you have.

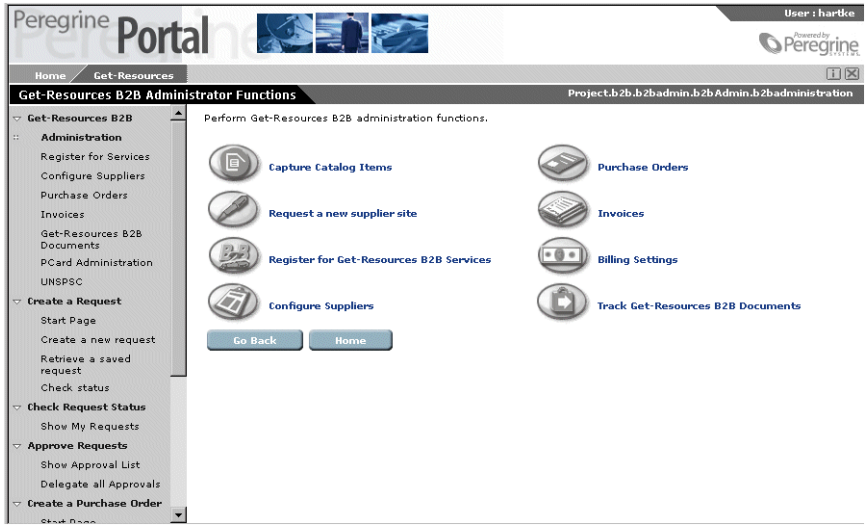
Before you begin, have ready the information the supplier sent you, such as your user ID and password.

To configure suppliers:

1 From the Get-Resources home page, click the Get-Resources B2B icon.

The **Get-Resources B2B Administrator Functions** window appears.

You can begin configuring suppliers from this page.



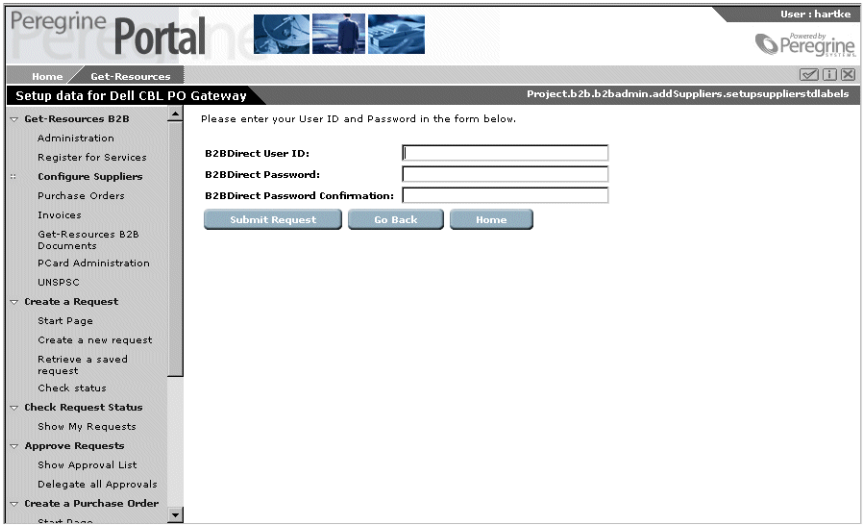
2 Click the **Configure Suppliers** icon.

3 In the **Select Activity** page that opens, click **Add a new B2B Site**.

The **Choose Supplier** page that appears displays the list of suppliers that Peregrine has enabled to work within the Get-Resources B2B environment.

4 To contact the supplier electronically, click the name of the supplier.

5 In the next page that opens, enter your user ID, password, and password confirmation, and then click Submit Request, as shown here.



Enter the user ID and password that the supplier has provided, and then click Submit Request.

The **Supplier Update Result** page that opens provides a confirmation message.

6 Click the Home button to return to the Get-Resources Home page.

Modifying or deleting access to ShopDirect sites

Once you've configured a supplier for Get-Resources, you can change your user ID and password or remove access to the supplier altogether.

To change access to ShopDirect sites:

1. From the Get-Resources home page, click the **Get-Resources B2B** icon.
2. Click **Configure Suppliers**.
3. In the **Select Activity** page that opens, click the **Remove or Modify Access to a B2B Site** icon.

   A list of your configured suppliers appears.
4. Click the name of the supplier to which you want to change access.
5. In the next page that opens, update the user ID and password and click **Modify Entry**.

   A confirmation message appears.
6. To remove access to the site, click the **Remove Site Access button**.

   The message "Access to [supplier site] has been removed" appears.
7. Click the Home button to return to the Get-Resources Home page.

Requesting a new supplier site

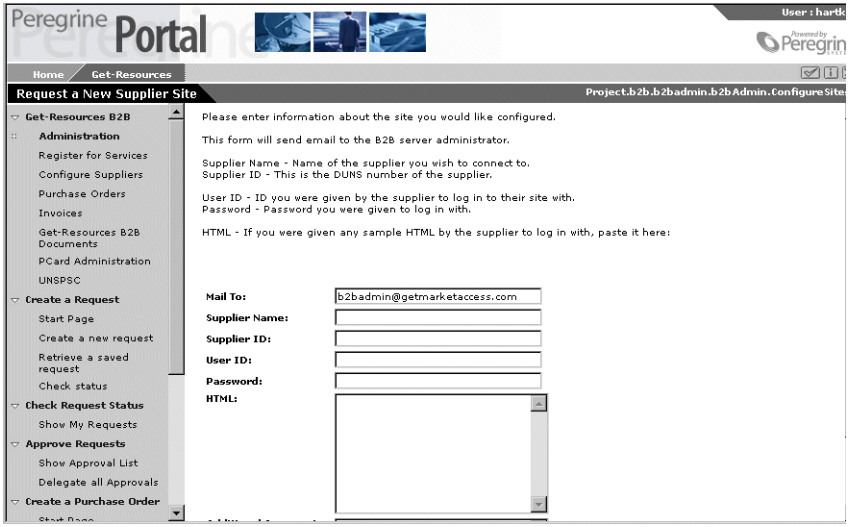
If a supplier that you want to work with is not available through Get2Connect.net, you can request that Peregrine create a contract with that supplier so you can access the supplier's ShopDirect site.

To request a new supplier site:

1. From the Peregrine Portal, click the Get-Resources B2B icon.
2. In the **Get-Resources B2B Administrator Functions** page that opens, click **Request a new supplier site**.

The **Request a New Supplier Site** page opens. .

Use this page to request that Peregrine contract a supplier that is not part of Get2Connect.net.



The instructions on this page explain how to complete this form.

3 Enter the requested information in the **Request a New Supplier Site** page, and then click **Submit Request**.

A confirmation message appears.

4 Click the Home link to return to the Home page.

When you request a new supplier, a Peregrine B2B administrator contacts the supplier to get the ShopDirect URL, tests the link, and then you can add the supplier to your options with Get-Resources.

Capturing and downloading catalogs

There are several ways to store catalogs in your AssetCenter database. When you want to limit the items that your end-users can choose from, you capture and store catalog items from ShopDirect sites. When the end-users browse selections, they can request items from a supplier without visiting the supplier's ShopDirect site itself. (For detailed information about catalogs, see *Understanding Catalogs* on page 113.)

To capture and download catalog items:

1 From the Get-Resources Home page, click the **Get-Resources B2B** icon.

2 In the **Get-Resources B2B Administrator Functions** page that opens, click **Capture Catalog Items**.

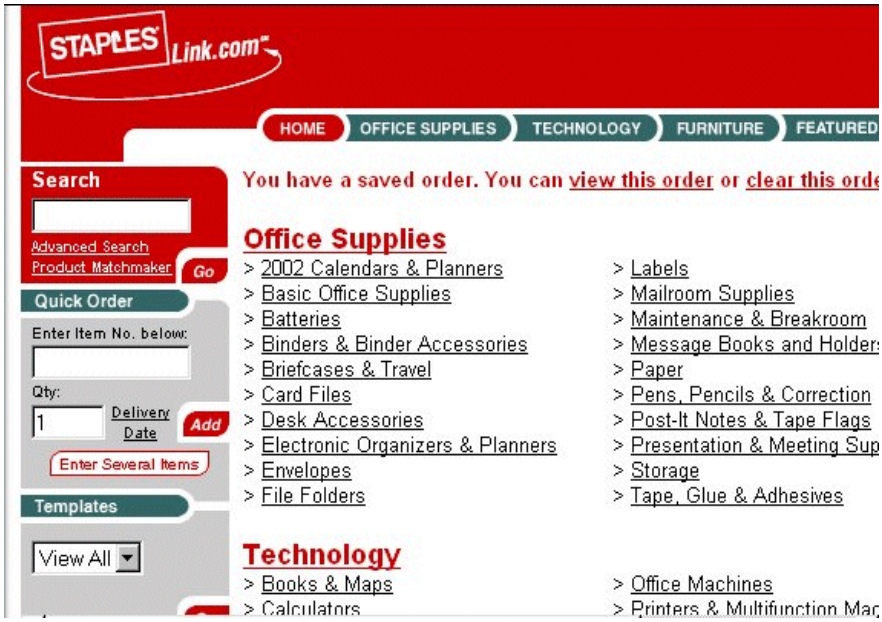
The next page that opens shows the supplier sites for which you have ShopDirect access.

3 Click a supplier name.

The ShopDirect site for that supplier opens.

As an example, a portion of the Staples ShopDirect site appears here.

The Staples ShopDirect site



4 Use the links on the ShopDirect page to begin capturing items.

The steps you take to capture items from a supplier depend on that supplier's site. Typically, capturing items uses similar steps to shopping online. When you've finished the procedure, the items will be imported into your AssetCenter database for end-users to browse.

5 Set category and certification.

These choices determine the category under which the items appear and what types of assets are created in AssetCenter when the item is purchased.

Note: The default certification is ShopDirect. However, ShopDirect-certified items won't be visible to users in the catalog.

6 Click **Update** to store the items in the catalog.

Working with purchase orders

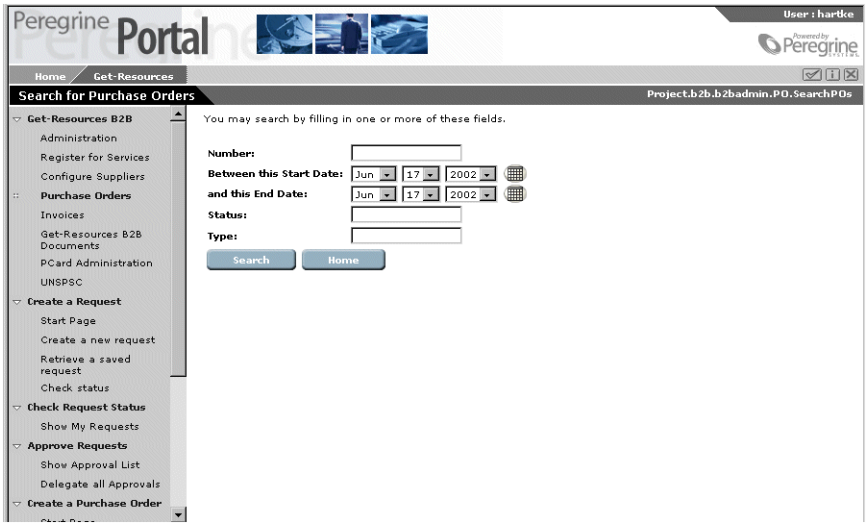
From Get-Resources, you can check the status and details of purchase orders. You can search for a specific purchase order or see a list of all outstanding POs at once.

To view purchase orders:

1 From the Get-Resources Home page, click the **Get-Resources B2B** icon.

2 In the **Get-Resources B2B Administrator Functions** page that opens, click the **Purchase Orders** icon.

The **Search for Purchase Orders** page opens.



Use this page to find POs by number, date, status, or type.

3 Use the fields in this page to narrow your search. Enter information about a specific PO you want to see, such as number, date range, status or type, and then click Search. To see a list of all POs, leave the fields on this page blank, and then click Search.

The Purchase Orders page opens, showing a list of your POs.

4 To see details about one purchase order, click the PO in the list.

5 When you've finished, click the Home button.

Note: Purchase order statuses are updated frequently in Get-Resources B2B Services. When you check the status of a PO, click the **Refresh** button to see if a status has been updated. If a purchase order status goes unchanged for long, make sure you've set the Use Get2Connect.net flag in AssetCenter's Supplier table to True. You must set this flag to True for each supplier.

Working with invoices

From Get-Resources, you can check the status and details of invoices. You can search for a specific invoice or see a list of all outstanding invoices at once.

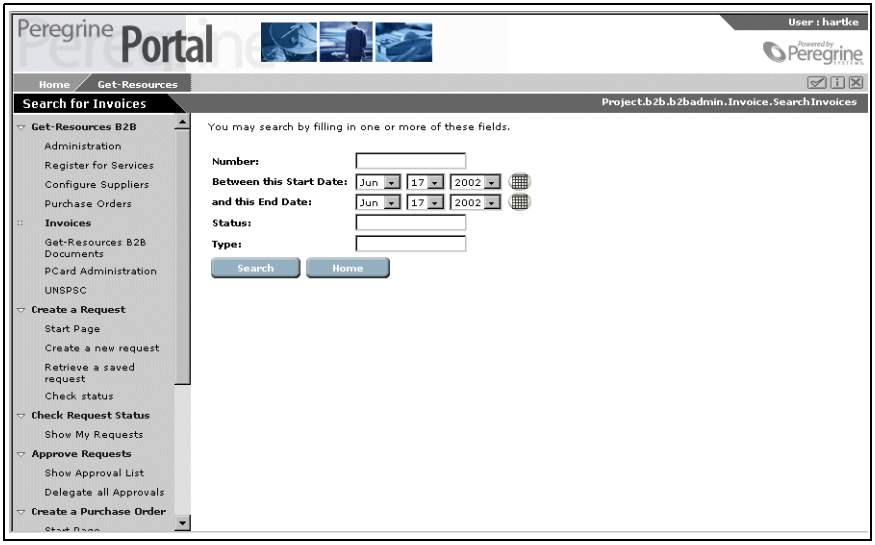
To view invoices:

1 From the Get-Resources Home page, click the **Get-Resources B2B** icon.

2 In the **Get-Resources B2B Administrator Functions** page that opens, click the **Invoices** icon.

The **Search for Invoices** page opens.

Use this page to find invoices by number, date, status, or type.



3 Use the fields in this page to narrow your search. Enter information about a specific invoice you want to see, such as number, date range, status or type, and then click **Search.** To see a list of all invoices, leave the fields on this page blank, and then click **Search.**

The **Invoice** page opens, showing a list of your invoices.

4 To see details about one invoice, click the invoice in the list.

5 When you've finished, click the Home button.

Tracking B2B documents

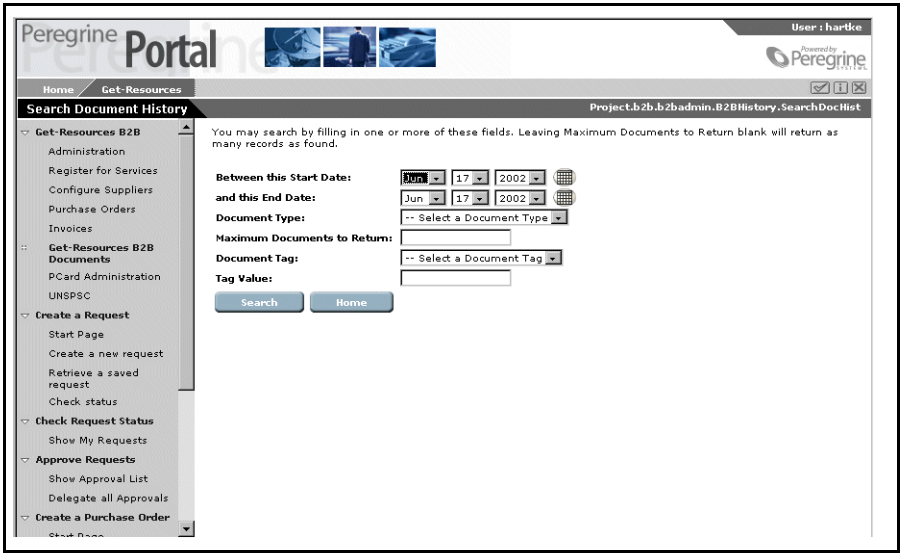
If you want to see purchase orders as well as other documents, such as invoices or catalog update messages, use the Track B2B Documents feature.

1 From the Get-Resources Home page, click the **Get-Resources B2B** icon.

2 In the **Get-Resources B2B Administrator Functions** page that opens, click **Track Get-Resources B2B Documents**.

The **Search Document History** page opens.

Use this page to find a document by date, document type, or other criteria.



3 Use the fields in the **Search Document History** page to narrow your search, and then click **Search**.

4 In the list of documents that appears, click a document to see its details. When you have finished, click the **Administration** link.

15 CHAPTER Frequently Asked Questions

Most Get-Resources administrators have questions about B2B communication. This chapter provides answers to the most frequently asked questions.

What is a "protocol"?

A protocol is a set of criteria for a process. In the case of Get2Connect.net, the B2B protocol has many elements. For the benefit of example, the following list includes four elements:

- transport method, such as HTTP, HTTPS, or SMTP. The transport protocol determines how information is sent between systems.
- envelope technology, such as MIME. This protocol determines how information is encapsulated when it is sent between systems
- document content, which determines what type of documents can be sent between systems. For example, the B2B protocol permits purchase orders and invoices, but not documents unrelated to B2B transactions.
- security technology. The security options determine how information is encrypted or authenticated, for example, when it is sent between systems.

Does Get2Connect.net support purchase order modification?

No, because none of the protocols supported by the suppliers do. This is a limitation of the supplier protocols, not a limitation of Get2Connect.net. Future versions of Get2Connect.net might permit purchase order modification.

Should I use AssetCenter or Get-Resources to submit a PO?

Peregrine recommends that you use Get-Resources for all B2B tasks, including submitting and approving purchase orders. If you use AssetCenter instead, some information in the purchase might become incorrectly mapped.

When a user orders an item, is the product table in the AC updated?

Yes it updated at every instance. To create a request and/or a purchase order, the item must exist in the product table.

Does Get-Resources recognize UNSPSC codes?

Yes, as of release 2.0 (or 1.3, service patch 2) Get-Resources can map UNSPSC codes to specific categories that you choose.

How does integration with CommerceOne work?

Get2Connect.net can interact with marketsites built using CommerceOne technology. These are intermediary networks similar to Get2Connect.net or Ariba Commerce Services Network.

If a Get-Resources customer subscribes to a marketsite, the customer can use Get-Resources and Get2Connect.net to transact with that marketsite just as if they were using CommerceOne BuySite.

How does integration with SupplyAccess work?

SupplyAccess is a Peregrine partner that operates an ASP-hosted, IT-equipment procurement offering. Designed for procurement professionals who prefer not to host their own procurement application, SupplyAccess is a web site where users can compare prices of IT equipment from over a dozen resellers. Get-Resources can access SupplyAccess through the ShopDirect feature of Get2Connect.net.

How does Get-Resources access the catalog data from a marketsite?

Get-Resources can obtain the catalog data in one of two ways. A Peregrine representative can arrange for catalog data files from the marketsite to be downloaded to a server in Peregrine's Get2Connect.net. There the catalog can be converted to XML and transported to the customer's Get-Resources application behind their firewall using HTTPS.

The second method is that if one or more of the suppliers in the marketsite support RoundTrip, Get-Resources can connect to those suppliers through Get2Connect.net using the ShopDirect feature.

Regardless of the shopping method, approved requests that become purchase orders are transmitted to Get2Connect.net using HTTPS. Get2Connect.net updates Get-Resources every step of the way.

What is an Ariba-enabled supplier?

"Ariba-enabled suppliers" are really "cXML-enabled suppliers"--that is, they support cXML protocol. A common misconception about such suppliers is that cXML documents must travel through Ariba networks. Actually, Get2Connect.net interacts directly with cXML-enabled suppliers.

Get-Resources pulls catalog data from Get2Connect.net in intervals. What is the best interval?

Peregrine recommends a daily update from Get2Connect.net. How often you set up Get-Resources to poll Get2Connect.net for catalog data depends on how critical updates are to you.

Doesn't updating the catalogs once a day create backlogs?

Get2Connect.net sends only the catalog changes, not the catalogs in their entirety. For best results, set your update time to occur after business hours.

How does your system resolve catalog integration?

Catalog integration is one of the most difficult components of implementing a B2B system. Peregrine is extremely flexible in its catalog integration process and thus we can integrate vendors much quicker and at a much lower cost. Unlike other B2B vendors, we do not require a vendor to adopt a specific standard or invest in a new system or technology. We will support their existing investment, infrastructure and communication methods. We support all communication standards including HTTP, SMTP, and FTP.

How should I set up my approval workflows?

There is no simple answer for designing the approval workflows. The best rule is the simpler the better. Peregrine typically recommends setting a few rules based on level of the requester and type of product selected. Based on the level of the requester, workflow rules are typically driven by the dollar amount of the request. Lower level employees typically will require managerial approval at a lower dollar amount than more senior employees. Also, lower level employees may require a secondary approver if the dollar amount is large. For example, an administrative person can request items without approval for requests under $500; for items greater than $500 the person would need approval from his/her manager. If the amount is greater than $1,500, the manger's manager would be required to approve the purchase.

Peregrine also recommends implementing functional approval. Function-specific products such as IT, furniture, and so on would require approval from the particular functional department. Peregrine typically recommends this approval to be serial to the manager's approval to reduce the administrative burden on these departments.

Should I allow my employees to select all items or should I use generic descriptions?

This depends on the types of products. For office supplies and other non-complex products, you can display the standard catalog items to all users. This would not be the entire Office Supplies catalog, but the approximately 200 typical items the corporation uses and has standardized. We would recommend buyer hosting for this catalog. We would then provide Shop Direct Access for a few identified administrators to the broader Office Supply Catalog for one-off purchases. The general employee would make an off-catalog textual request (done through Get-Resources) which is forwarded to the administrative person who can view the entire office supplies catalog using ShopDirect and make the purchase for the employee.

For more complex products such as IT and furniture we recommend creating pre-defined bundles or generic descriptions. For instance, a salesman would be able to select a sales staff's laptop or a salesman's chair. This generic request would either be tied to a specific product which would automatically be ordered or the functional approver would then edit the request and make the specific product selection either from the internal catalog or a ShopDirect catalog depending on the method used.

Should I assign approvals to specific individuals or to groups?

Peregrine recommends that managerial approval/financial approval be assigned to an individual while the functional approval (IT expert etc.) be assigned to a group. This helps speed the approval process at the functional level.

How do you integrate third party applications such as my ERP system?

There are several ways to integrate third party applications. The two most common are through a batch import/export routine written for your organization or through using an Enterprise Application Integration (EAI) vendor such as NEON, Vitria, or Active Software.

If the integration is simple, Peregrine Professional Services or a Certified Solution Partner can customize a batch import/export routine between Get-Resources and the third party product.

However, if the integration is complex, you can use an EAI vendor's product. If an EAI Vendor's product is used, Get-Resources would send an XML document via HTTP of the information to be sent to the third party system to the Enterprise Application Integration (EAI) product. The EAI product would have gateways to the third party product pre-built and the product would translate the XML document to the format the third party application requires and send the document to that application. Certain Peregrine products can integrate any EAI product that is based on MQ Series.

Peregrine Professional Services or a Certified Solution Partner can help determine the optimal way to integrate to your back office systems.

What should the process flow look like?

There are several steps in the B2B cycle:

Step 1 User authentication

Step 2 Product selection (based on user)

Step 3 Approval cycle (based on user)

Step 4 Purchase order generation

Step 5 Purchase order submittal

Step 6 General ledger entry

Step 7 Product receipt (at receiving dock)

Step 8 End user acceptance

Step 9 Invoice received

Step 10 PO/Invoice Reconciliation

Step 11 Payment

The user identifications and organizational hierarchy are maintained either in an HR database or an LDAP directory. This system would be integrated to the Get-Resources user directory through an import/export batch or through an EAI vendor package that supports MQ Series.

The catalogs are maintained in Get-Resources and specific views of the catalogs are displayed based on the user rights in Get-Resources. Once items are selected, the Get-Resources workflow engine would drive the approval process (organizational hierarchy would be stored in Get-Resources but managed in the HR or LDAP system). Once approved, Get-Resources would turn the request into a purchase order. Get-Resources would receive a range of purchase order numbers from the ERP or Purchasing System, but Get-Resources would assign the purchase order number. It is recommended that a range of purchase order numbers be initially assigned for Get-Resources to assign. You should assign approximately one year's worth of POs that would be generated in Get-Resources. This would minimize the need to keep synchronizing the two systems for PO numbers only. For instance, if it is anticipated that ten thousand POs would be generated in Get-Resources, the purchasing system would pre-assign PO numbers 1-10,000 to Get-Resources and those POs that are not generated in Get-Resources but the Purchasing System would begin at 10,001.

The reason to generate the PO in Get-Resources is that Get-Resources is the system that can send the PO to Get2Connect.net which automatically and electronically submits POs to vendors and automatically and electronically receives acknowledgements, shipping notices and invoices from the vendors which can be displayed in Get-Resources or kick-off additional workflow process such as scheduling technicians to install product or automatically perform PO/Invoice reconciliation.

Once the PO is generated, Get-Resources would send the PO information to the ERP/Purchasing/Financial System to update the general ledger accounting system via a batch import/export or by using an EAI product.

When the product arrives, receiving should be done in Get-Resources as Get-Resources can capture more detailed information especially for the lifecycle assets that need to be tracked. If payment is authorized on receipt, then Get-Resources can automatically notify the payment system that the product was received. Alternatively, the notification can occur when the end-users accepts which should also be done through Get-Resources. The notification can also occur after PO/Invoice reconciliation is done which can either be done in Get-Resources or the Financial System. The invoice should be received in Get-Resources as Get2Connect.net can automatically send the invoice directly to be reconciled in Get-Resources.

Once notified, the financial system would issue the payment. Most of the process is done within Get-Resources as Get-Resources is what is connected to Get2Connect.net which automates the business to business transactions of PO submittal, acknowledgment, shipping notices and invoices.

How do you recommend integrating the HR, Purchasing System and Financial Systems?

Peregrine recommends two ways depending on the sophistication of the systems. If the systems are simple, Peregrine professional services can create import/export batch routines to exchange information. If the integration is more complex, we recommend using an EAI vendor that supports MQ Series.

If we want to, can we use our own workflow product?

Yes, but Peregrine does not recommend it. It is another integration to manage which adds cost and complexity to your solution.

Can purchase orders be generated, product received, and reconciliation completed in our purchasing/ERP/financial system be done?

Yes, but Peregrine does not recommend this. You lose the value of sending and receiving the electronic documents through Get2Connect.net. You would be manually entering information or manually sending purchase orders or receiving product. This would be a more expensive solution.

Can the catalog be managed in my ERP catalog system?

Yes, but we typically do not recommend this. You will have to create your own electronic linkages to your vendors to receive these catalogs. We can automate this process through Get2Connect.net linking to the vendors and automatically updating your catalog in Get-Resources.

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