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INTELLICYBER

INTELLICYBER SCM WM PORTAL 4.0 USER GUIDE





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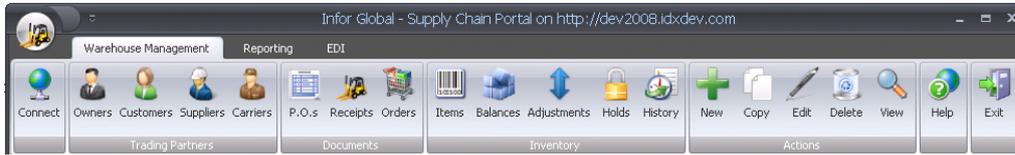
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Introduction

The *Intellicyber SCM Warehouse Management Portal* allows users around the world to access, view and create supply chain documents, view and manage inventory balances, holds, history and adjustments, and print reports, labels and attachments; all via the internet.



Extend the visibility of SCM data.

The *Infor SCM Warehouse Management Portal* leverages the accessibility of the Internet and adapters to the Infor WM, to provide supply chain partners internet access to warehouse or other inventory node data. This extended data visibility facilitates collaboration among supply chain partners and enables them to make informed business decisions quickly and more accurately.

The *Intellicyber SCM WM Portal* allows supply chain partners to access documents and inventory information from the Infor WM Systems to increase the integration of the supply chains for suppliers, customers and carriers.

Portal also enables managers and supervisors to view and interact with IDX4 runtime environment to monitor interface logs, history and errors, as well as access the data files used in the interfaces themselves.

Key Features

The *Intellicyber SCM WM Portal* contains functionality designed to enable consolidated visibility of data from one or many Infor WM9 systems (and extendable to other Infor SCM systems), and provide the ability to create and modify documents and information in those systems.

- Global Inventory Balances across multiple warehouses
- Detailed inventory views, including holds, adjustments and history
- Purchase Orders
- Advanced Shipment Notices (ASN's)
- Customer / Shipment Orders

Facility	WHS Ref	Owner	External #	Status	Type	Carrier	Carrier Ref	Expected On	Closed On
Singapore	000000080	O'REILLY	1000890100370988	In Receiving	Normal	FDX		2010-06-08	1900-01-01
Dubai	000000021	APRESS	1000262107210736	New	Normal	FDX		2010-06-17	
Japan	000000011	SYBEX	1000264131020532	New	Normal	FDX		2010-06-16	
Singapore	000000073	APRESS	100081901060360	Closed	Normal	UPS		2010-06-08	2010-08-12
Singapore	000000076	QUE	1000082200000234	Closed	Normal	DHL		2010-08-08	2010-08-11
Singapore	000000079	WROK	1000904001000425	Closed	Normal	FDX		2010-08-08	2010-08-11
Singapore	000000078	SYBEX	1000900000003640	Closed	Normal	FDX		2010-06-08	2010-08-11
Singapore	000000077	MICROSOFIT	1000082206240227	Closed	Normal	FDX		2010-06-08	2010-08-09
Singapore	000000075	O'REILLY	10000822020570837	Closed	Normal	FDX		2010-06-08	2010-08-09
Singapore	000000074	SAMS	1000082002120974	Closed	Normal	DHL		2010-06-08	2010-08-09
Singapore	000000071	MICROSOFIT	1000081808100778	Closed	Normal	UPS		2010-06-08	2010-08-09
Singapore	000000072	O'REILLY	1000081908170741	Closed	Normal	UPS		2010-06-08	2010-08-09
Singapore	000000068	SYBEX	1000081761190516	Closed	Normal	FDX		2010-06-08	2010-08-09
Singapore	000000069	O'REILLY	1000081762090741	Closed	Normal	DHL		2010-06-08	2010-08-09
Singapore	000000070	WROK	1000081703010332	Closed	Normal	DHL		2010-06-08	2010-08-09
Singapore	000000067	MICROSOFIT	1000081416060580	Closed	Normal	FDX		2010-06-08	2010-08-09
Singapore	000000066	O'REILLY	1000081415130706	Closed	Normal	FDX		2010-06-08	2010-08-09
Singapore	000000064	APRESS	1000081088090946	Closed	Normal	DHL		2010-06-08	2010-08-09
Singapore	000000065	O'REILLY	1000081088270445	Closed	Normal	UPS		2010-06-08	2010-08-09
Singapore	000000063	SYBEX	1000081087540165	Closed	Normal	FDX		2010-06-08	2010-08-09
Singapore	000000059	SAMS	1000080800040995	Closed	Normal	FDX		2010-06-08	2010-08-09
Singapore	000000062	WROK	1000080991240519	Closed	Normal	UPS		2010-06-08	2010-08-09
Singapore	000000061	MICROSOFIT	1000080900420170	Closed	Normal	FDX		2010-06-08	2010-08-09
Singapore	000000060	O'REILLY	1000080900010851	Closed	Normal	FDX		2010-06-08	2010-08-09
Singapore	000000058	O'REILLY	1000080700010481	Closed	Normal	FDX		2010-06-07	2010-08-09
Singapore	000000056	APRESS	10000806000050240	Closed	Normal	FDX		2010-06-07	2010-08-09
Singapore	000000057	MICROSOFIT	1000080601070489	Closed	Normal	UPS		2010-06-07	2010-08-09
Singapore	000000055	O'REILLY	1000080400580173	Closed	Normal	UPS		2010-06-07	2010-08-09



Getting started

To utilize Portals, users only need to install the Portal client to enable access to the WM9 inventory data, documents, reports and other information. This assumes that an administrator has configured and setup the user accounts and permissions on the Portal Server (See the Intellicyber SCM WM Portal 4.0 Administrator and Install Guide for further information on installing and configuring the Portal Server).

Installing the Portal client

Pre-requisites:

1. Windows XP, Vista or Windows 7
2. .Net Framework 3.5 SP1 (Link to install on Portal install page)
3. Minimum screen resolution of 1024x768
4. Internet Connection

Installation Steps:

1 - On the client machine, via Internet Explorer, go to the following URL

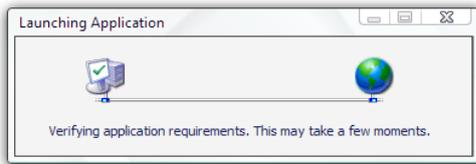
<http://idxcentral.idxdev.com/INFIDXSCP/publish.htm>



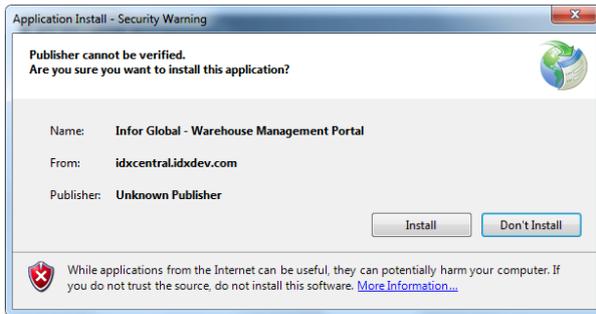
2 – IF .Net 3.5 SP1 is not detected, install using the hyperlink provided at the bottom of the page.

3 - Click the install button.

The system will verify the components installed

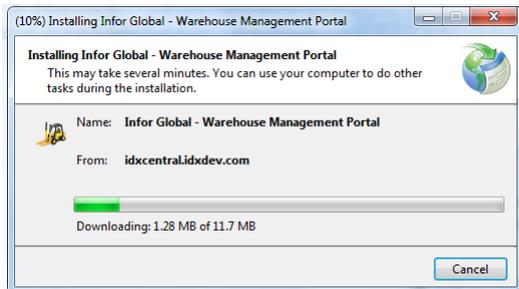


The Windows installer will then ask you to verify if you wish to install the Portal Client application

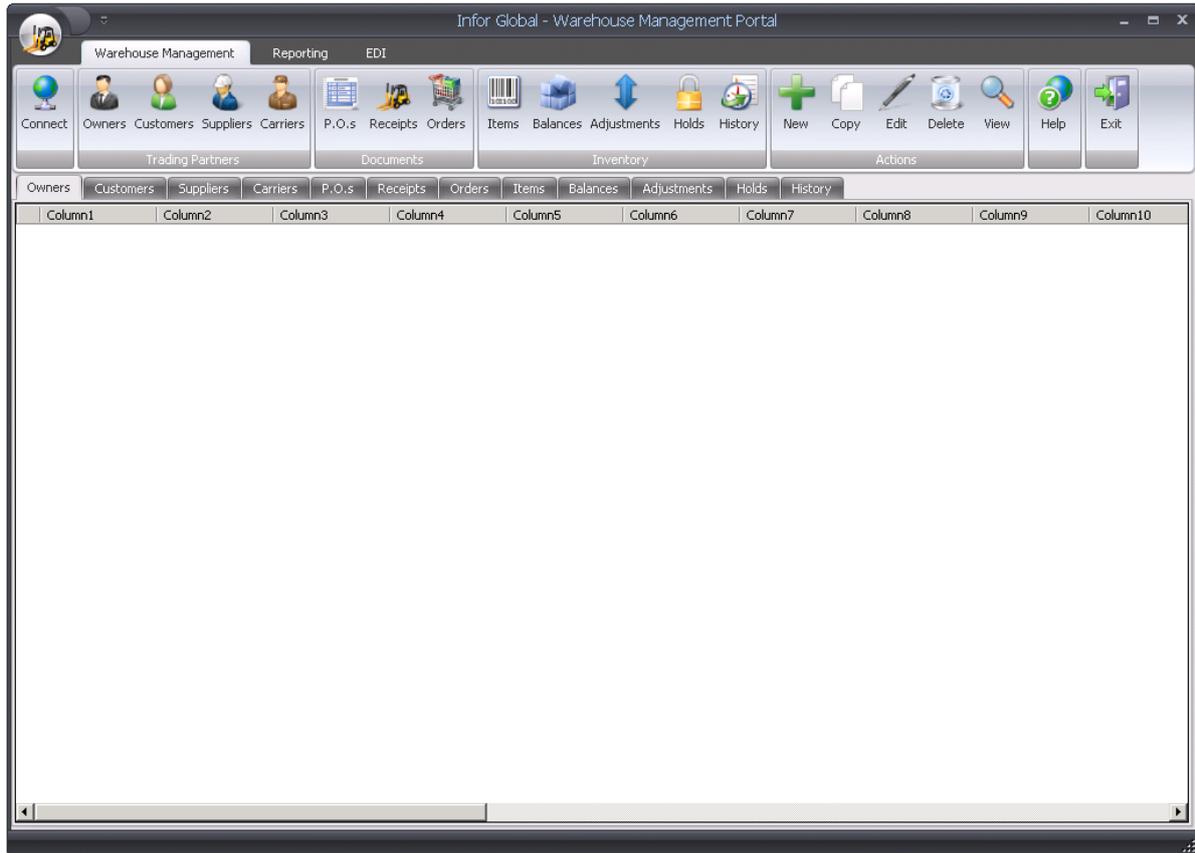


Select 'Install' to continue.

The Portal Installer will now download the application



Once downloading has completed, the Portal application will launch.



Installation has completed.

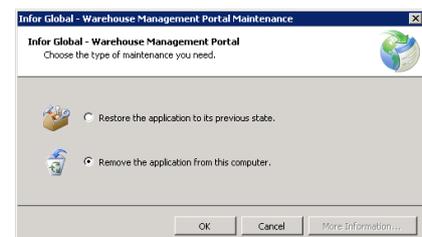
Removing the Client installation.

To remove the client installation, go to the Control Panel in Windows.

Select add remove programs.

Find the 'Infor Global – Warehouse Management Portal' application, and select Change/Remove.

From the Dialog box that appears, select the Remove application option and click OK.





Using the Intellicyber SCM WM Portal

To start the application: select the 'Infor Global – Warehouse Management Portal' shortcut from the start menu, it will be located in the Intellicyber program group.

When the portal first starts, it will check for any new versions, and if it detects a new version, it will prompt the user to update.

It will open with a blank screen, as shown above.

Connecting to a Portal Server

The first step is to connect to the appropriate Portal Server.

Click the 'Connect' menu button to bring up the login dialog.



The login dialog box will appear asking for user name, password and the Portal server to connect to.

Server Login

INFOR™

User ID:

Password:

Server URL:

Cancel Login

Your login and password, as well as the correct Server URL will be provided by the system administrator within your own network.

The Portal client will remember your last Server URL and User ID details, so you don't need to keep entering these each time you start the program, you just have to enter your password (unless you want to change users or logon to a different portal server).

If you are successfully, you will see the status bar in the bottom right corner of the screen inform you, that you are connected correctly, and to which server you have connected.

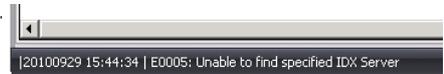
Administrator|20110223 15:36:13 | P0002: Successfully connected to IDX Server at http://dev2008



If you do not Connect and login, no data, reports or details will be available to you.

User Name or Password is Incorrect:

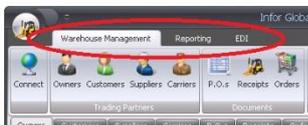
The Server URL does not match, or server is offline, or network issue:



Main Portal Navigation

Within Portal are three levels of navigation. At the highest level tabs between “Warehouse Management”, “Reporting” and “EDI”.

The “EDI” section is discussed in the Administrators section below.



The Next layer down contains the main **REFRESH BUTTONS**. These buttons will cause the Portal Client to download information again from the Portal Server. In Warehouse Management, selecting a REFRESH BUTTON will prompt the user to enter filter information and then the client will retrieve information from the portal server.



In the Reporting tab, selecting the ‘Reports’ button, will download the list of appropriate reports from the server.



Underneath the ‘refresh buttons’ are the NAVIGATE tabs. These move the user between data that is already in the Portal application memory, and will NOT refresh or download the data again.





Portal Warehouse Management Functions

Once you are successfully connected to a Portal Server you can retrieve document, data, and reports that are available to your user group.

Screen layout, column labels, data displayed, reports available to you, are all defined by the Portal Server Administrator (and configured according the Intellicyber SCM WM Portal 4.0 Administrator and Install Guide)

Your account may be restricted to certain data or functions only. Documents and inventory that do not match your security restrictions may not display any data.

Portals works off a centralized database which will display data from multiple warehouses and servers (depending on your security permissions), so careful attention needs to be paid to the Facility column in the lists, documents and data entry screens.

Concepts and Terms

The Refresh Buttons will prompt for filter values to narrow down the search and data displayed. When you select the Refresh button, the Filters will open a pop-up window. The values in the filter box are configured on the Portals Server by Administrators and developers, and specified for your User Group.

After entering data into the filter prompts, the Portal will retrieve data and display it in a list view.

After selecting the record you want, click the 'VIEW' button, and the Document view will open.

Each document view contains Header information on the left panel, and Line information on the tabs to the right.



Each List View, Document View, Line View, Data Entry and Edit Screens, Filter lists and Reports are definable by User Group and Portal installation. Screens shown here are standard, but may not reflect the columns, data or layouts shown on your local system.

List Filters

For each List view in Portals, the filter pop-up will display the possible search filters which will be used to restrict or narrow down the data.

The Filters displayed will be appropriate to the Refresh Button selected.

The filters needed will be displayed in the filter column, and the value will contain the user data needed to restrict the results.

You may enter any values into the filter values if you wish, but all data will be returned without filters. The number of rows returned may be restricted.

In the example below, an Item is needed to retrieve all product information for that commodity. To enter this value, select the value and type in the required information.



Item	
------	--

It is important that you press ENTER after each value to 'lock it in'.

ExpectedDateTO	
Item	AWT398764
ReceiptStatus	

A lot of the Portal filter values for Text use the 'LIKE % xx %' function from SQL, which means that it does not have to exactly match the value to return that data. Usually these LIKE fields are for fields such as Description, Company, Address, and State. They are configurable in the Portal Server by the Portal Administrator.

Set Filter Values

The Save Filter values button is used to remember the currently entered value in the Value boxes. To use, enter the values you wish to be default, and then the Set Filter Values button. If all goes well, the status bar will display 'Filter Values Saved', and these values will be displayed when the report is requested next.

Date Helper

If the filter values require a date value, then the date helpers will assist in entering this information. Date Helpers will ensure that dates are always entered in the correct format for users to avoid conflicts with different countries formats.

Filter	Value
ASNEExternalKey	
ASNOwner	
ASNWMSKey	
CarrierCode	
ExpectedDateF...	2010/09/28 00:00:00
ExpectedDateTO	
Item	AWT398764

In the above example, an Expected Date From is desired to be entered. By clicking in the date helper tab, users can select Yesterday, Today or Tomorrow. This will then put that date in the correct format in the filter space. You can manually change this value now if you need (i.e. to change to 18:00:00).

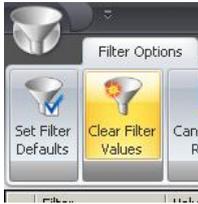
Notice that the format of the date is YYYY/MM/DD HH:MM:SS. This is a standard default date in Portal for submitting dates in the filter values.

Click back on the Filter options tab to continue the "Submit Request"



Clear Filter Values

If you wish to delete all values in the filters, select the Clear Filters button from the menu ribbon. This will remove all values.



Request Submitted

Once the Filter request has been submitted, the Portal client will get the information and layout from the Portal server

For the list view, the following steps will be done and displayed in the status bar

Administrator|20110223 15:46:02 | P0011: Submitting report request ...

Administrator|20110223 15:45:36 | S0007: Getting List Layout ...

Administrator|20110223 15:46:37 | S0008: Getting Data ...

Administrator|20110223 15:47:17 | S0009: Displaying Data ...

Administrator|20110223 15:46:56 | S0010: Done

Similar steps will be done for document and line views, depending on the document or inventory selected.



Portal Functions

The following portal functions will be restricted based on user group. The user group permissions you have will determine which views, lists and functions you have access to. Layouts, views and data may be restricted.

To open the list view of for each of the functions, click the large button and the filter values popup will appear. Enter any filter values needed and click the Submit button.

The Portal client will return a maximum of 200 rows for list views.

Trading Partners

Owners

The Owners Submit Refresh button will return all appropriate Owners, and appropriate details. Filter values are typically based around Owner Keys, Company Names, Address and Contact information.

Code	Owner Company Name	Street Address	City	State	Zip	Contact	Phone
APRESS	APRESS BOOKS INC.						
BORDERS	BORDERS BOOKS INC.						
MICROSOFT	MICROSOFT PRESS INC.						
O'REILLY	O'REILLY PUBLISHERS INC.						
QUE	QUE BOOKS INC.						
SAMS	SAMS BOOKS INC.						
SYBEX	SYBEX PRESS INC.						
WROX	WROX BOOKS INC.						

While it is possible to have an extended Owner 'Doc' view, this is not enabled by default.

Customers

The Customers Submit Refresh button will return all appropriate Customers or Consignees, and any appropriate details. Filter values are typically based around Customer Keys, Company Names, Address and Contact information.

Code	Borders Store Location	Street Address	City	State	Zip	Contact	Phone
BBKAK	Borders SuperStore - St. Michael	3522 Kidd CJG2 Avenue	St. Michael	AK	99659	Scott Graves	907-923-7046
BBKAL	Borders SuperStore - Birmingham	268 Bedford Street	Birmingham	AL	35203	Anthony Cain	205-222-9373
BBKAR	Borders SuperStore - El Dorado	2342 Cedar Street	El Dorado	AR	71730	Elizabeth Scudder	870-875-8674
BBKAZ	Borders SuperStore - Phoenix	2466 Griffin Street	Phoenix	AZ	85041	James Rudd	602-323-1361
BBKCA	Borders SuperStore - Santa Ana	575 Paradise Lane	Santa Ana	CA	92705	Tasha Boyd	909-753-3552
BBKCO	Borders SuperStore - Pueblo	4444 Berry Street	Pueblo	CO	81003	Robin Gibson	719-695-1891
BBKCT	Borders SuperStore - Meriden	3761 Whitman Court	Meriden	CT	06450	David Hammonds	203-560-9936
BBKDC	Borders SuperStore - Washington	1711 Rhode Island Avenue	Washington	DC	20005	Candice Steele	202-383-7240
BBKDE	Borders SuperStore - Philadelphia	4539 Columbia Road	Philadelphia	DE	19108	Anthony Rodriguez	302-782-3037
BBKFL	Borders SuperStore - Boca Raton	4546 Wyatt Street	Boca Raton	FL	33434	Staci Haugen	561-483-8774
BBKGA	Borders SuperStore - Snellville	2955 Pine Garden Lane	Snellville	GA	30278	Kyle Ratliff	770-736-5817
BBKHI	Borders SuperStore - Honolulu	2680 Don Jackson Lane	Honolulu	HI	96826	Crystal Duck	808-951-7002



To view the detailed Customer view, select the appropriate customer and click 'View'.

Customer Details display in the tabs on the doc header left pane. Information is available on Customer Address information, Billing Address information tab, and Notes tab.

Detailed line tabs display standard master data attachments



A Line level tab Called 'Top 50 Current Open Orders' shows the last 50 outstanding orders in all permissible warehouses for this customers

Another Line tab called 'Top 50 Recently Shipped Orders' displays the last 50 orders which have been most recently shipped from all permissible warehouses.

CUSTOMERS

General Billing Notes

Company Information

Customer Key: BBKAK
Customer Name: Borders SuperStore - St Michael

Delivery Address

Address 1: 3522 Kidd CJG2 Avenue
Address 2:
Address 3:
Address 4:
City: St Michael
State: AK
Postcode: 99659
Country: US

Contact Information

Contact 1: Scott Graves
Contact 2:
Phone 1: 907-923-7046
Phone 2:
Fax 1:
Fax 2:
Email 1:
Email 2:

CUSTOMER ORDERS

Top 50 Current Open Orders Top 50 Recently Shipped Orders Attachments

	Facility	WMS Key	External Key	Owner	Order Status	Order
	Singapore	0000009325	BBKAK1008111030320323	SAMS	Created Externally	Stand
	Singapore	0000009324	BBKAK1008111030320323	WROX	Created Externally	Stand
	Singapore	0000009323	BBKAK1008111030320323	MICROSOFT	Created Externally	Stand
	Singapore	0000009322	BBKAK1008111030320323	QUE	Created Externally	Stand
	Singapore	0000009321	BBKAK1008111030320323	OREILLY	Created Externally	Stand
	Singapore	0000009320	BBKAK1008111030320323	SYBEX	Created Externally	Stand

Customers can be added or deleted to and from the WMS data, using the 'New' and 'Delete' functions on the main Refresh bar. Existing Customers can be modified and edited from the detail view 'Edit' function.

Suppliers

The Suppliers Submit Refresh button will return all appropriate Suppliers or Vendors, and any appropriate details. Filter values are typically based around Supplier Keys, Supplier Names, Address and Contact information.

Filter

- Address1
- City
- Contact
- Country
- State
- SupplierCode
- SupplierName
- Zip

Warehouse Management Reporting EDI

Connect Owners Customers Suppliers Carriers P.O.s Receipts Orders Items Balances Adjustments Holds History New Copy Edit Delete View Help Exit

Trading Partners Documents Inventory Actions

Code	Company Name	Street Address	City	State	Zip	Contact	Phone
SUPP2	Supplier 02	Add 1	Singapore	SIN	Zip 08		
ICYBER	Intellicyber Ltd.	03-05 Park East	Singapore	SIN	457265	Ashok Pereira	64416609

To view the detailed Supplier view, select the appropriate supplier and click 'View'.



Supplier details display in the tabs on the doc header left pane. Information is available on supplier address information, billing address information tab, and notes tab.

Detailed line tabs display standard master data attachments



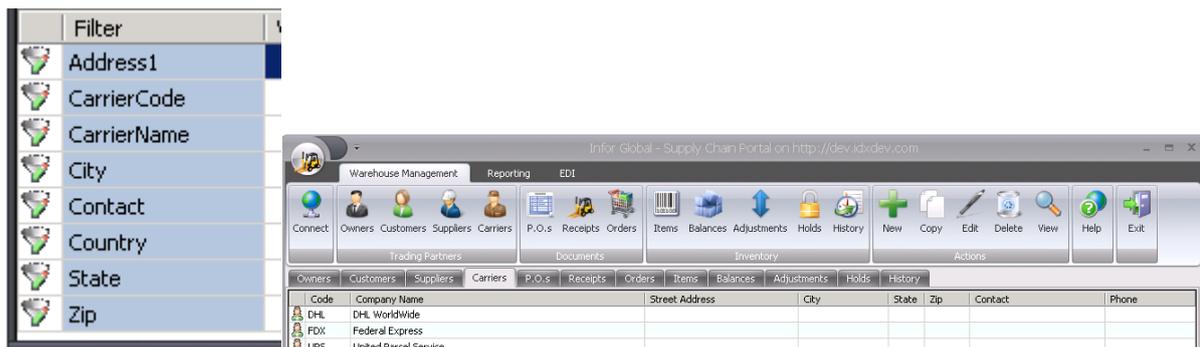
A Line level tab called 'Top 50 Current Pending Receipts' shows the last 50 Advanced Shipment Notices that have not started Receiving in all permissible warehouses for this Supplier.

Another Line tab called 'Top 50 Recently Received Receipts' displays the last 50 ASN's which have been most recently received from all permissible warehouses.

Suppliers can be added or deleted to and from the WMS data, using the 'New' and 'Delete' functions on the main Refresh bar. Existing Suppliers can be modified and edited from the detail view 'Edit' function.

Carriers

The Carrier Submit Refresh button will return all appropriate Carriers, and any appropriate details. Filter values are typically based around Carrier Keys, Carrier Names, Address and Contact information.



To view the detailed Carrier view, select the appropriate carrier and click 'View'.

Carrier details display in the tabs on the doc header left pane. Information is available on carrier address information, billing address information tab, and notes tab.

Detailed line tabs display standard master data attachments



A Line level tab called 'Top 50 Current Open Receipts' shows the last 50 Advanced Shipment Notices that have not started Receiving in all permissible warehouses for this carrier.

Another Line tab called 'Top 50 Current Unshipped Orders' shows the last 50 Shipment Orders that have not been shipped in all permissible warehouses for this carrier.

Carriers can be added or deleted to and from the WMS data, using the 'New' and 'Delete' functions on the main Refresh bar. Existing carriers can be modified and edited from the detail view 'Edit' function.

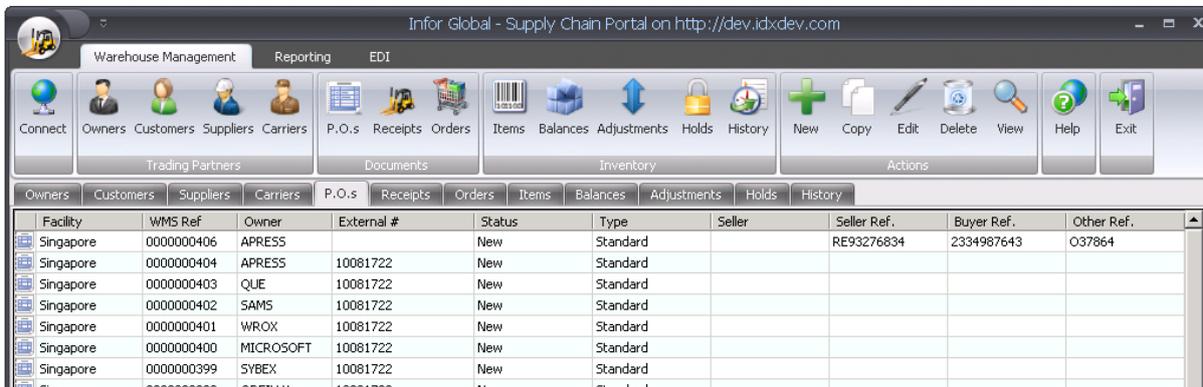
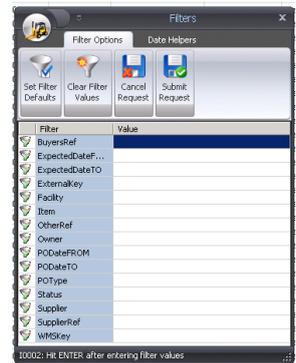


Documents

Purchase Orders

The Purchase Order Refresh Button will return Purchase Orders documents from the Portal Server.

Filter values typically include WMS Reference Keys, Facility, Customer PO Number, Item (will return any PO's with that Item in the detail), Owner, Supplier, Status, Expected Dates (TO and FROM), other secondary reference numbers.



To view the detailed PO Document view, select the appropriate PO and click 'View'.



The screenshot displays the 'Purchase Order' window for document PO 0000000406. The interface is divided into several sections:

- Document Header:** Includes a toolbar with icons for Submit, Add Detail Line, Print, Edit, Delete, Attach, View, and Close.
- Purchase Order Header (Left Pane):**
 - General:** Facility: Singapore, WMS Key: 0000000406, Owner: APRESS, External Key: , External Key 2: , Sellers Ref.: RE93276834, Buyers Ref.: 2334987643, Other Ref.: O37864, PO Group: .
 - Flags:** Status: New, PO Type: Standard.
 - Dates:** PO Date: 8/19/2010 6:27:07 AM, Expected Date: 8/27/2010 4:00:00 PM, Vessel Date: 8/1/2010 4:00:00 PM.
 - Weights and Measures:** Qty. Ordered: 680, Qty. Received: 0, Expected Weight: 1584, Expected Volume: 14.76.
- PO DETAIL LINES (Right Pane):** A table with columns: Line, Ext, Item, Description, Ordered, Received, UOM, Pack, Status, Price, W. It contains two rows:

Line	Ext	Item	Description	Ordered	Received	UOM	Pack	Status	Price	W
00001		1430204400	ZK Step-By-Step: Ajax without Java5...	560	0	EA	STD	New	0	0
00002		1430204400	ZK Step-By-Step: Ajax without Java5...	120	0	EA	STD	New	0	15

At the bottom left, the status bar reads: Borders User|20100929 19:17:14 | 50010: Done

Purchase Order Header information displays in the tabs on the doc header left pane. Information is available on all the Purchase Order reference information, including primary key information Facility, Owner and WMS Keys (if the PO has been created in the WMS), and External Keys. The Current PO Status, PO Type and most of the PO dates and PO quantity, weight and cube totals are also displayed. Additional tabs include carrier transportation information and terms of delivery, and notes and user defined field information.



Purchase Order

General | **Carrier** | Notes/UDF

References

Facility: Singapore

WMS Key: 0000000406

Owner: APRESS

External Key:

External Key 2:

Sellers Ref.: RE93276834

Buyers Ref.: 2334987643

Other Ref.: O37864

PO Group:

Flags

Status: New

PO Type: Standard

Dates

PO Date: 8/19/2010 6:27:07 AM

Expected Date: 8/27/2010 4:00:00 PM

Vessel Date: 8/1/2010 4:00:00 PM

Weights and Measures

Qty. Ordered: 680

Qty. Received: 0

Expected Weight: 1584

Expected Volume: 14.76

General | **Carrier** | Notes/UDF

References

Facility: Singapore

WMS Key: 0000000406

Owner: APRESS

External Key:

Delivery

Origin: China

Load: Hong Kong

Discharge: Hong Kong

Delivery: Seattle

Destination: United States

Terms

Delivery Terms: CFR Cost and Freight

Payment Terms: COD

Line Level information from the PO is displayed in the Lines tab on the right.

PO DETAIL LINES

Lines | Attachments

Line	Ext	Item	Description	Ordered	Received	UOM	Pack	Status	Price	Wgt	Vol	UDF 1	UDF 2	UDF 3	UDF 4	UDF 5	Notes
00001		1430204400	ZK Step-By-Step: Ajax without JavaScript Framew...	560	0	EA	STD	New	0	0	0						
00002		1430204400	ZK Step-By-Step: Ajax without JavaScript Framew...	120	0	EA	STD	New	0	1584	14.76						

Detailed line tabs display standard document attachments



Purchase Orders can be added or deleted to and from the WMS data, using the 'New' and 'Delete' functions on the main Refresh bar. Existing Purchase Orders can be modified and edited from the detail view 'Edit' function.



Receipts

The Receipt Refresh Button will return Advanced Ship Notice (ASN) Receipt documents from the Portal Server.

Filter values typically include WMS Reference Keys, Facility, Customer Reference Number, Item (will return any ASN's with that Item in the detail), Owner, Supplier, Status, Expected Dates (TO and FROM), other secondary reference numbers.

Filter	Value
ASNEsternalKey	
ASNOwner	
ASNWMSKey	
CarrierCode	
ExpectedDateF...	
ExpectedDateTO	
Item	
ReceiptStatus	
ReceiptType	
SupplierCode	
WarehouseFacility	

Facility	WMS Ref	Owner	External #	Status	Type	Carrier	Carrier Ref.	Expected On	Closed On
Dallas	000000022	MICROSOFT	1008261308180194	Received	Normal	FDX		2010-08-08	1900-01-01
Singapore	0000000112	APRESS	WMS0000000112	New	Normal			2010-08-20	
Singapore	0000000111	APRESS	1008172107310706	New	Normal	FDX		2010-08-17	1900-01-01
Singapore	0000000084	SAMS	1008091306220337	In Receiving	Normal	UPS		2010-08-09	1900-01-01
Singapore	0000000101	SYBEX	1008121312020522	In Receiving	Normal	FDX		2010-08-17	1900-01-01
Singapore	0000000086	MICROSOFT	1008091308180194	In Receiving	Normal	FDX		2010-08-09	1900-01-01
Singapore	0000000085	O'REILLY	1008091307220651	In Receiving	Normal	UPS		2010-08-09	1900-01-01
Singapore	0000000081	APRESS	1008090836500706	In Receiving	Normal	FDX		2010-08-09	1900-01-01

To view the detailed Receipt Document view, select the appropriate Receipt and click 'View'.

Line	Ext Line	Item	Description	Expected	Received	UOM	Pack	Status
00001	0001	0735623961	Microsoft Office Excel 2007: D...	1	0	EA	STD	New
00002	0002	B00318D9Y2	The Fourth Paradigm: Data-In...	1	0	EA	STD	New
00003	0003	0735627118	Windows Server 2008 Adminis...	1	0	EA	STD	New
00004	0004	0735626197	MCTS Self-Paced Training Kit (...)	5	5	EA	STD	Received
00005	0005	0735625107	MCITP Self-Paced Training Kit ...	1	0	EA	STD	New
00006	0006	0735627045	CLR via C# (Dev-Pro)	1	1	EA	STD	Received
00007	0007	0735626650	Windows 7 Inside Out	2	0	EA	STD	New
00008	0008	0735623872	Beyond Bullet Points: Using Mi...	1	1	EA	STD	Received
00009	0009	0735623252	Microsoft Office Access 2007 I...	5	0	EA	STD	New
00010	0010	0735623783	Working with Microsoft Dynami...	1	0	EA	STD	New
00011	0011	0735625727	MCITP Self-Paced Training Kit ...	3	3	EA	STD	Received
00012	0012	0735626898	Microsoft Office 2010 Inside Out	1	0	EA	STD	New
00013	0013	0735626677	Windows 7 Step by Step (Step...	2	0	EA	STD	New
00014	0014	0735625654	MCTS Self-Paced Training Kit (...)	1	0	EA	STD	New
00015	0015	0735625301	Windows® Internals: Includin...	1	1	EA	STD	Received
00016	0016	0735626189	Microsoft SQL Server 2008 MD...	1	0	EA	STD	New
00017	0017	0735626952	Microsoft Project 2010 Step b...	1	0	EA	STD	New
00018	0018	0735626693	Microsoft Visual Basic 2010 Ste...	1	0	EA	STD	New
00019	0019	0735626057	MCTS Self-Paced Training Kit (...)	1	1	EA	STD	Received
00020	0020	0735627126	Microsoft Exchange Server 20...	3	0	EA	STD	New
00021	0021	0735626391	MCTS Self-Paced Training Kit (...)	1	0	EA	STD	New
00022	0022	0735623015	Microsoft Office PowerPoint 2...	1	0	EA	STD	New
00023	0023	073562304X	Microsoft Office Excel 2007 St...	1	0	EA	STD	New
00024	0024	0735626480	Active Directory Administrator'...	1	0	EA	STD	New
00025	0025	0735627002	Windows 7 Resource Kit	5	0	EA	STD	New
00026	0026	0735626944	Microsoft Excel 2010 Step by ...	2	0	EA	STD	New
00027	0027	0735619670	Code Complete: A Practical Ha...	2	0	EA	STD	New

ASN Header information displays in the tabs on the doc header left pane. Information is available on all the ASN reference information, including primary key information Facility, Owner and WMS Keys (if the ASN has been created in the WMS), and External Keys. The Current ASN Status, ASN Type and



most of the ASN dates and ASN quantity, weight and cube totals are also displayed. Additional tabs include supplier information User defined fields and notes, and carrier transportation information including terms of delivery, origin destination and detailed tracking information.

The screenshot shows the RECEIPT form with three tabs: General, Supplier, and Carrier. The General tab is active and contains the following sections:

- References:** Facility: Singapore, WMS Key: 0000000086, Owner: MICROSOFT, External Key: 1008091308180194, Purchase Order: (empty)
- Flags:** Status: In Receiving, Receipt Type: Normal
- Dates:** Date Created: 8/9/2010 5:10:35 AM, Last Receipt Date: 8/17/2010 2:33:51 PM, Expected Date: 8/9/2010 5:10:36 AM, Actual Ship Date: (empty), Planned Ship Date: (empty), Advice Date: 8/9/2010 5:10:36 AM, Advice Date: (empty)
- Weights and Measures:** Qty. Expected: 768, Qty. Received: 233, Expected Weight: 0, Actual Weight: 0
- Supplier:** Supplier Code: (empty), Supplier Name: (empty), Address 1: (empty), Address 2: (empty), Address 3: (empty), Address 4: (empty), City: (empty), State: (empty), Postcode: (empty), Country: (empty)
- User Defined:** UDF 1: (empty), UDF 2: (empty), UDF 3: (empty), UDF 4: (empty), UDF 5: (empty)
- Notes:** Notes: (empty)
- Carrier:** Carrier Code: FDX, Carrier Name: (empty), Carrier Reference: (empty), Vehicle Number: (empty), Trailer Number: (empty), Driver Name: (empty), Vehicle Date: (empty)
- Terms:** Delivery Terms: (empty), Payment Terms: (empty), Transport Mode: Parcel

Line Level information from the ASN is displayed in the Lines tab on the right.

The screenshot shows the RECEIPT DETAIL LINES table with the following data:

Line	Ext Line	Item	Description	Expected	Received	UOM	Pack	Status
00001	0001	0735623961	Microsoft Office Excel 2007: D...	1	0	EA	STD	New
00002	0002	B00318D9Y2	The Fourth Paradigm: Data-In...	1	0	EA	STD	New
00003	0003	0735627118	Windows Server 2008 Adminis...	1	0	EA	STD	New
00004	0004	0735626197	MCTS Self-Paced Training Kit (...)	5	5	EA	STD	Received
00005	0005	0735625107	MCITP Self-Paced Training Kit ...	1	0	EA	STD	New
00006	0006	0735627045	CLR via C# (Dev-Pro)	1	1	EA	STD	Received

Detailed line tabs display standard document attachments



ASN Receipts can be added or deleted to and from the WMS data, using the 'New' and 'Delete' functions on the main Refresh bar. Existing ASN Receipts can be modified and edited from the detail view 'Edit' function.



Orders

The Orders Refresh Button will return Shipment Order documents from the Portal Server.

Filter values typically include WMS Reference Keys, Facility, Customer Reference Numbers, Owner, Order Status, Order Groups, Tracking Numbers, Carriers, Routes, Customers, Shipment and Order Dates (TO and FROM), other secondary reference numbers.

Filter	Value
CarrierKey	
Country	
CustomerKey	
CustomerRef	
Facility	
OrderDateFROM	
OrderDateTO	
OrderGroup	
OrderStatus	
Owner	
Route	
ShipDateFROM	
ShipDateTO	
TrackingNumber	
WMSKey	

The screenshot shows the Infor Global Supply Chain Portal interface. At the top, it says 'Infor Global - Supply Chain Portal on http://dev.idxdev.com'. Below this is a navigation bar with tabs for Warehouse Management, Reporting, and EDI. A toolbar contains icons for Connect, Owners, Customers, Suppliers, Carriers, P.O.s, Receipts, Orders, Items, Balances, Adjustments, Holds, History, New, Copy, Edit, Delete, View, Help, and Exit. Below the toolbar are tabs for Trading Partners, Documents, Inventory, and Actions. The main area shows a table with columns: Facility, WMS Ref, Owner, External #, Customer, Tracking Number, Customer Name, Status, and Type. The table lists 12 orders from Singapore, all with a status of 'Created Externally' and a type of 'Standard Order'.

Facility	WMS Ref	Owner	External #	Customer	Tracking Number	Customer Name	Status	Type
Singapore	000009773	QUE	BBKOH1008172234540422	BBKAK		Borders SuperStore - St Mic...	Created Externally	Standard Order
Singapore	000009772	SYBEX	BBKOH1008172234540422	BBKAL		Borders SuperStore - Birming...	Created Externally	Standard Order
Singapore	000009771	SAMS	BBKOH1008172234540422	BBKAR		Borders SuperStore - El Dorado	Created Externally	Standard Order
Singapore	000009770	WROX	BBKOH1008172234540422	BBKOH		Borders SuperStore - Youngs...	Created Externally	Standard Order
Singapore	000009769	MICROSOFT	BBKOH1008172234540422	BBKOH		Borders SuperStore - Youngs...	Created Externally	Standard Order
Singapore	000009768	O'REILLY	BBKOH1008172234540422	BBKOH		Borders SuperStore - Youngs...	Created Externally	Standard Order
Singapore	000009767	APRESS	BBKOH1008172234540422	BBKOH		Borders SuperStore - Youngs...	Created Externally	Standard Order
Singapore	000009766	QUE	BBKNH100817223220836	BBKNH		Borders SuperStore - Chester	Created Externally	Standard Order
Singapore	000009765	MICROSOFT	BBKNH100817223220836	BBKNH		Borders SuperStore - Chester	Created Externally	Standard Order
Singapore	000009764	SAMS	BBKNH100817223220836	BBKNH		Borders SuperStore - Chester	Created Externally	Standard Order
Singapore	000009763	O'REILLY	BBKNH100817223220836	BBKNH		Borders SuperStore - Chester	Created Externally	Standard Order

To view the detailed Order Document view, select the appropriate Order and click 'View'.



The screenshot displays the 'INTELLICYBER SCM WM PORTAL 4.0' interface. The window title is 'SO 000009773'. The interface is divided into two main sections: 'ORDERS' on the left and 'ORDER DETAIL LINES' on the right.

ORDERS Section:

- General:** Facility: Singapore, WMS Key: 000009773, Owner: QUE, External Key: BBKOH1008172234540422, External Load: UP5387643.
- Flags:** Status: Created Externally, Priority: 5, Order Type: Standard Order.
- Dates:** Order Date: 8/17/2010 10:34:54 PM, Delivery Date: 8/17/2010 2:42:30 PM, Delivery Date 2: 8/17/2010 2:42:30 PM, Requested Ship Date: 8/17/2010 2:42:30 PM, Actual Ship Date: 8/17/2010 2:42:30 PM, Departure Date: 8/17/2010 2:42:30 PM.
- Customer:** Customer: BBKAK, Company: Borders SuperStore - St Michael, Destination: United States.

ORDER DETAIL LINES Section:

Line	Ext Line	Item	Description	Original Qty	Open Qty	Shipped Qty	UOM	Pack	Status	SPD
00001	00027	B000OZ0N62	The Inmates Are Runnin...	1	1	0	EA	STD	Created Externally	
00002	00030	B00142KQES	Windows Presentation F...	1	1	0	EA	STD	Created Externally	

The bottom status bar shows: 'Borders User|20100929 19:18:35 | 50010: Done'.

Order Header information displays in the tabs on the doc header left pane. General information is available on all the Order reference information, including primary key information Facility, Owner and WMS Keys (if the Order has been created in the WMS), and External Keys. The Current Order Status, Priority, Order Type and most of the Order dates are also displayed. A carrier transportation tab displays terms of delivery, origin destination, carrier information and detailed tracking information. The Customer tab displays the Delivery address details, and the Notes tab shows user defined fields and notes.



ORDERS			
General	Carrier	Customer	Notes
References			
Facility:	Singapore		
WMS Key:	0000009773		
Owner:	QUE		
External Key:	BBKOH1008172234540422		
External Load:	UPS387643		
Flags			
Status:	Created Externally		
Priority:	5		
Order Type:	Standard Order		
Dates			
Order Date:	8/17/2010 10:34:54 PM		
Delivery Date:	8/17/2010 2:42:30 PM		
Delivery Date 2:	8/17/2010 2:42:30 PM		
Requested Ship Date:	8/17/2010 2:42:30 PM		
Actual Ship Date:	8/17/2010 2:42:30 PM		
Departure Date:	8/17/2010 2:42:30 PM		
Customer			
Customer:	BBKAK		
Company:	Borders SuperStore - St Michael		
Destination:	United States		

ORDERS			
General	Carrier	Customer	Notes
References			
Facility:	Singapore		
WMS Key:	0000009773		
Owner:	QUE		
External Key:	BBKOH1008172234540422		
External Load:	UPS387643		
Locations			
Origin:	Singapore		
Destination:	United States		
Discharge:	Seattle		
Delivery:	Seattle		
Carrier			
Carrier Code:	UPS		
Carrier Name:	United Parcel Service		
Trailer Number:	JIU4387		
Trailer Owner:	MAERSK		
Trailer Type:			
Terms			
Delivery Terms:	EXW Ex Works		
Payment Terms:	Diners Club		
Transport Mode:	Less Than Trailer Load		



ORDERS

General Carrier Customer Notes

References

Facility: Singapore

WMS Key: 0000009773

Owner: QUE

External Key: BBKOH1008172234540422

External Load: UPS387643

Delivery

Customer: BBKAK

Company: Borders SuperStore - St Michael

Address 1: 3522 Kidd Avenue

Address 2:

Address 3:

Address 4:

City: St Michael

State: AK

PostCode: 99659

Country:

Phone:

Email:

ORDERS

General Carrier Customer Notes

References

Facility: Singapore

WMS Key: 0000009773

Owner: QUE

External Key: BBKOH1008172234540422

External Load: UPS387643

User Fields

UDF 1:

UDF 2:

UDF 3:

UDF 4:

UDF 5:

Notes

Notes:

Picking Notes:

Line Level information from the Order is displayed in the Lines tab on the right.

ORDER DETAIL LINES

Lines Case Tracking Serial Numbers Attachments

Line	Ext Line	Item	Description	Original Qty	Open Qty	Shipped Qty	UOM	Pack	Status
00001	00027	B000OZ0N62	The Inmates Are Runnin...	1	1	0	EA	STD	Created Externally
00002	00030	B00142KQES	Windows Presentation F...	1	1	0	EA	STD	Created Externally

The Case Tracking tab is used if the WMS is configured for Small Parcel Shipping tracking and can display related pickdetail tracking ID's.

ORDER DETAIL LINES

Lines Case Tracking Serial Numbers Attachments

SPS Case ID	WMS Case ID	Tracking Number	Rate	Type	Wave Key	Len	Wdt	Hgt
0000000001	0000023555	6123983645	121.45	1				
0000000002	0000025060	6123983646	60.12	1				

Detailed line tabs display standard document attachments



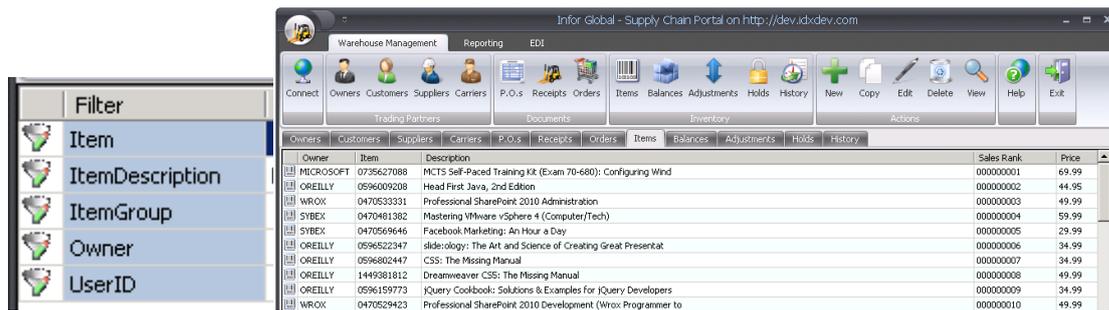


Orders can be added or deleted to and from the WMS data, using the 'New' and 'Delete' functions on the main Refresh bar. Existing Orders can be modified and edited from the detail view 'Edit' function.

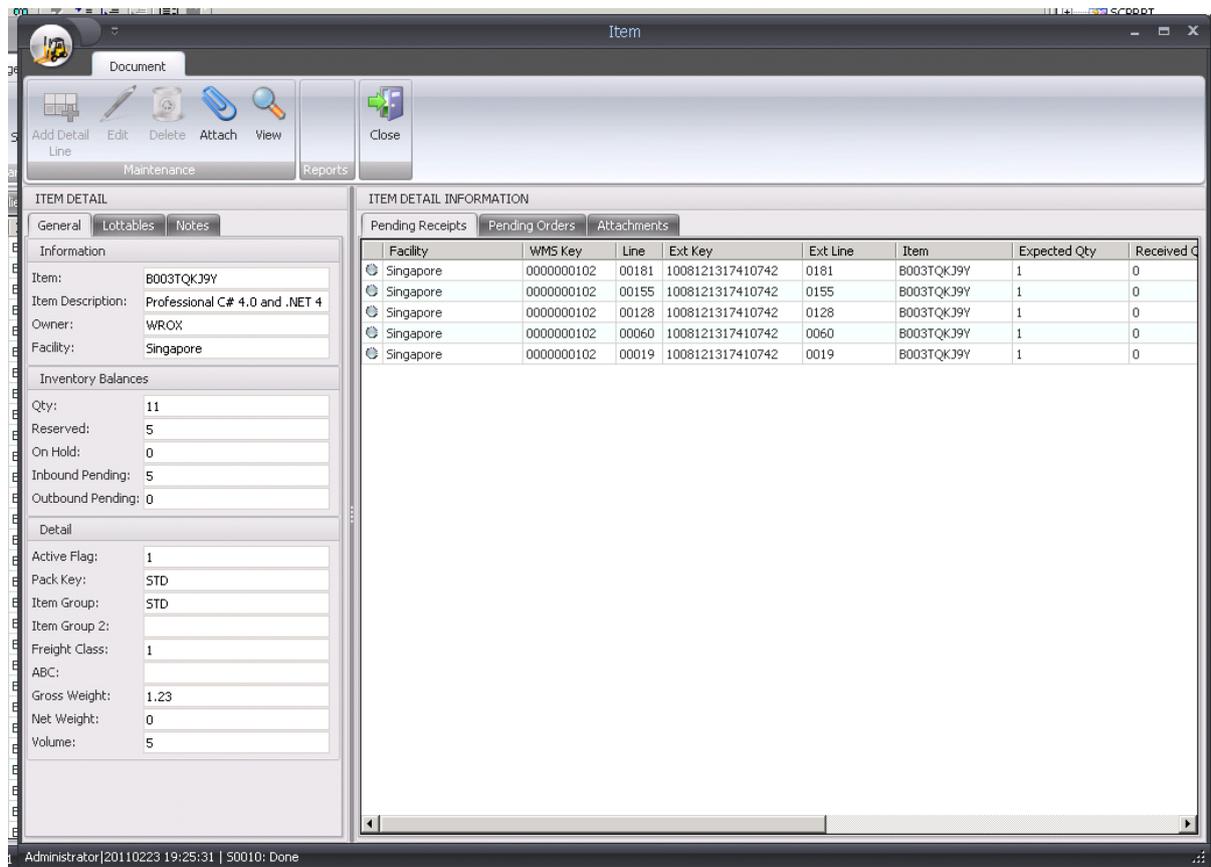
Inventory

Items

The Item Submit Refresh button will return all appropriate Items, restricted by User group, and any appropriate details. Filter values are typically based around Owners, Items, Item Description, Item Groups. By Default Item master information is viewed and inserted at the ENTERPRISE level in the warehouse.



To view the detailed Item view, select the appropriate Item and click 'View'.





Enterprise level Item details display in the tabs on the doc header left pane. (In some facilities depending on your security permissions, it is possible to view multiple warehouse product setup from this screen. In most cases it will be based on the WMS Enterprise schema though).

Information is available on packkey, active flags, weight and cube information, User defined fields, and lot labels.

Detailed line tabs display standard master data

Line level tabs called 'Pending Receipts' and 'Pending Orders' display all inbound ASN's that are not closed, and unshipped outbound orders for that Item.

ITEM DETAIL INFORMATION							
Pending Receipts		Pending Orders		Attachments			
	Facility	WMS Key	Line	Ext Key	Ext Line	Item	Expe
	Singapore	0000000102	00181	1008121317410742	0181	B003TQKJ9Y	1
	Singapore	0000000102	00155	1008121317410742	0155	B003TQKJ9Y	1
	Singapore	0000000102	00128	1008121317410742	0128	B003TQKJ9Y	1
	Singapore	0000000102	00060	1008121317410742	0060	B003TQKJ9Y	1
	Singapore	0000000102	00019	1008121317410742	0019	B003TQKJ9Y	1

Items can be added into the WMS, using the 'New' function on the main Refresh bar. Existing Items can be modified and edited from the detail view 'Edit' function.

Balances

The Balance Submit Refresh button will return all appropriate Items and balance information restricted by User group, and any other appropriate details. Filter values are typically based around Facility, Owners, Items, Item Description, lot attribute (such as Expiry Date, Country of Origin, Batch Numbers), and flags to include zero quantity.

Filter		Infor Global - Supply Chain Portal on http://dev.idx.dev.com							
		Warehouse Management		Reporting		EDI			
		Connect	Owners	Customers	Suppliers	Carriers	P.O.s	Receipts	Orders
		Trading Partners			Documents			Inventory	
		Balances		Adjustments	Holds	History	Actions		
		Owners	Customers	Suppliers	Carriers	P.O.s	Receipts	Orders	Items
		Facility	Owner	Item	Item Description	Qty	Reserved	On Hold	Available
	BatchNo	Singapore	APRESS	1430210079	Pro ASP.NET MVC Framework	8	8	0	0
	CountryOfOrigin	Singapore	APRESS	1430219548	Beginning Java™ EE 6 Platform with GlassFish™ 3: From No	2	1	0	1
	DateOfExpiry	Singapore	APRESS	1430223812	Pro Silverlight 3 in C# (Expert's Voice in Silverlight)	4	1	0	3
	DateOfManufact...	Singapore	APRESS	1430223839	Ultra-Fast ASP.NET: Build Ultra-Fast and Ultra-Scalable web	2	2	0	0
	Facility	Singapore	APRESS	1430224592	Beginning iPhone 3 Development: Exploring the iPhone SDK	23	17	0	6
	Item	Singapore	APRESS	1430224770	Practical Arduino: Cool Projects for Open Source Hardware (T	19	19	0	0
	ItemDescription	Singapore	APRESS	1430224894	Build Your Own CNC Machine (Technology in Action)	7	5	0	2
	ItemOwner	Singapore	APRESS	143022505X	More iPhone 3 Development: Tackling iPhone SDK 3 (Beginning)	12	12	0	0
	ZeroQtyYes	Singapore	APRESS	1430225254	Visual C# 2010 Recipes: A Problem-Solution Approach	4	3	0	1
		Singapore	APRESS	1430225297	Pro ASP.NET 4 in C# 2010, Fourth Edition	2	2	0	0

In this view the Qty represents the Qty field from the WMS for that product in that facility. Multiple facilities will display their appropriate balances, depending on the user group permissions. The 'Reserved' column is a calculated field from the WMS adding 'Allocated', 'Pre-Allocated' and 'Picked'. 'On Hold' represents inventory that is unavailable, and the 'Available' represents quantity in the warehouse that should be available for shipping.

To view the detailed Balance view, select the appropriate Item and Facility and click 'View'.



Inventory Information for Singapore/WROX/0470502258

Document

Submit Add Detail Line Print Edit Delete Attach View Close

ITEM SUMMARY

General Pricing Carrier

Information

Item: 0470502258
 Item Description: Professional C# 4.0 and .NET 4
 Owner: WROX
 Facility: Singapore

Inventory Balances

Qty: 10
 Reserved: 4
 On Hold: 0
 Inbound Pending: 52
 Outbound Pending: 93
 A.T.P.: -35

Detail

Item Group: STD
 Active Flag: 1
 Gross Weight: 0
 Net Weight: 0
 Volume: 0

Re-order Information

Reorder Point: 5
 Reorder Qty: 100
 Reorder Cost: 24.67
 Reorder Needed?: True

ITEM DETAIL INFORMATION

Lines Catch Weight / Data UDF / Notes Attachments

WMS Lot	LPN	Quantity	Reserved	Status	Batch #	COO	Man Date	Exp Date
000000136	0000023055	1	1	0				
000000136	ID0000009260	3	3	0				
000000136	ID0000011068	6	0	0				

Borders User|20100930 11:16:59 | 50010: Done

Balance Header information displays in the tabs on the doc header left pane. Information is available on Current Status of the Item in the chosen Facility. In the default view, there are some additional calculated fields for balance information that includes the following:

- Inbound Pending – Sum of all Receipt quantity for this item not received where the ASN is not closed
- Outbound Pending – Sum of all Order quantity for this item not shipped
- A.T.P. – Pseudo Available to Promise based on available warehouse data showing quantity in the warehouse minus any hold inventory minus any already being processed on orders adding in any expected receipts and removing any pending orders.
- If the A.T.P. is less than the Re-order point from the Item Master, then the 'Reorder Needed' flag will be set to TRUE.

The Header tab also includes information such as weight and volume and active flags.

Line Level information from the Item/Facility is displayed in the Lines tab on the right.

ITEM DETAIL INFORMATION

Lines Catch Weight / Data UDF / Notes Attachments

WMS Lot	LPN	Quantity	Reserved	Status	Batch #	COO	Man Date	Exp Date
000000136	0000023055	1	1	0				
000000136	ID0000009260	3	3	0				
000000136	ID0000011068	6	0	0				



The Line level detail shows LOT level information for this item/facility. With the appropriate lot attributes displayed (Batch #, COO, Mon Date, Exp date, etc), along with the detail quantity information for that lot.

There are no edit or insert functions for balances.

Adjustments

The Adjustments Refresh Button will return Adjustment transaction documents from the Portal Server.

Filter values typically include WMS Reference Keys, Facility, Item, ID (LPN), Location, warehouse LOT number, or Reason Code.

Filter
AdjustmentKey
EffectiveDateFR...
EffectiveDateTO
Facility
ID
Item
LOC
LOT
Owner
ReasonCode

Facility	WMS Key	Owner	Item	Item Description	Qty	Reason	Location	LPN	WMS Lot	Date
Singapore	000000012	OREILLY	1449387845	iPad: The Missing Manual	-2	UNRECEIVE	STAGE	ID0000010493	0000000239	2010-08-12
Singapore	000000012	OREILLY	B0026OR3NK	Learning Perl	-4	UNRECEIVE	STAGE	ID0000010624	0000000128	2010-08-12
Singapore	000000012	OREILLY	0596516134	Learning OpenCV: Computer Vision wit...	-2	UNRECEIVE	STAGE	ID0000010450	0000000101	2010-08-12
Singapore	000000011	MICROSOFT	073562321X	Microsoft Office Excel 2007 Inside Out	-1	GENERAL	X01Y022027	ID0000010402	0000000017	2010-08-12
Singapore	000000010	OREILLY	0596802447	CSS: The Missing Manual	-2	QC	X05Y012005	ID0000010424	0000000011	2010-08-12
Singapore	000000009	WROX	0470529423	Professional SharePoint 2010 Develop...	2	QC	X04Y022014	ID0000010099	0000000025	2010-08-12
Singapore	000000009	WROX	0470584637	Beginning SharePoint 2010 Development	6	GENERAL	X03Y012053	ID0000009647	0000000158	2010-08-12
Singapore	000000009	WROX	0470529423	Professional SharePoint 2010 Develop...	-2	QC	X04Y022014	ID0000010099	0000000025	2010-08-12
Singapore	000000006	OREILLY	0596000014	Real-Time Linux: Systems	-15	UNRECEIVE	STAGE	LPN097001	0000000596	2010-08-12
Singapore	000000006	OREILLY	0596000057	Palm OS Network Programming: Writin...	-10	UNRECEIVE	STAGE	LPN09702	0000000597	2010-08-12
Singapore	000000006	OREILLY	0596000057	Palm OS Network Programming: Writin...	-10	UNRECEIVE	STAGE	LPN09703	0000000597	2010-08-12

To view the detailed Adjustment Document view, select the appropriate Adjustment and click 'View'.



The screenshot displays the 'Adjustment 0000000012' window. The left pane shows the 'Adjustment' header information, and the right pane shows the 'ITEM DETAIL INFORMATION' table.

Adjustment Header Information:

- Owner: OREILLY
- Facility: Singapore
- Adjustment Key: 0000000012
- Date: 2010-08-12 14:36:26
- Reason Code: UNRECEIVE
- WMS ASN Key: 0000000100

ITEM DETAIL INFORMATION Table:

Line	Item	Description	Adjusted	ITRN Key	Location	WMS Lot	ID
00001	1449387845	iPad: The Missing Manual	-2	0000092877	STAGE	0000000239	ID0000010493
00002	B0026OR3NK	Learning Perl	-4	0000092875	STAGE	0000000128	ID0000010624
00003	0596516134	Learning OpenCV: Computer ...	-2	0000092876	STAGE	0000000101	ID0000010450

Adjustment Header information displays in the tabs on the doc header left pane. General information is available on all the Adjustment reference information, including primary key information Facility, Owner and WMS Keys, and Adjustment Date. The Adjustment Reason Code is also displayed. If the adjustment is a document with multiple items, the WMS ASN Key will be populated, and the line item information will show all adjustments done on the Adjustment with the selected item. If the adjustment is a single adjustment and not linked to a document, the line item will just display the single record.



Adjustment

General

Information

Owner: OREILLY

Facility: Singapore

Adjustment Key: 0000000012

Date: 8/12/2010 6:36:26 AM

Reason

Reason Code: UNRECEIVE

Detail

Item Group:

Active Flag:

Gross Weight:

Net Weight:

Volume:

Unreceive

WMS ASN Key: 0000000100

Line Level information from the Adjustment is displayed in the Lines tab on the right.

ITEM DETAIL INFORMATION

Lines Catch Weight / Data UDF / Notes Attachments

Line	Item	Description	Adjusted	ITRN Key	Location	WMS Lot	ID	Reason	ASN Line	UON	Pack	Date
00001	1449387845	iPad: The Missing Manual	-2	000009...	STAGE	000000...	ID0000010493	UNRECEIVE	00006	EA	STD	2010-08...
00002	B0026OR3NK	Learning Perl	-4	000009...	STAGE	000000...	ID0000010624	UNRECEIVE	00011	EA	STD	2010-08...
00003	0596516134	Learning OpenCV: Computer Visio...	-2	000009...	STAGE	000000...	ID0000010450	UNRECEIVE	00018	EA	STD	2010-08...

Detailed line tabs display standard document attachments



Adjustments can be added to and from the WMS data, using the 'New' functions on the main Refresh bar. Adjustments cannot be deleted. Adjustments cannot be edited or changed.

Holds

The Holds Refresh Button will return Hold information from the Portal Server.

Filter values typically include Facility, Owner, Item, ID/LPN (FROM and TO), Location (FROM and TO), warehouse LOT number (FROM and TO), User who placed the hold on/off, Current Hold Status and Reason Code. A Flag for IncludeLOC allows override to display the system LOC holds as well in the returned result. Holds in the WMS are set by WMS LOT, Location or ID/LPN. These are the primary filter values used. Additional fields are sub lookups or additional data filters.



Filters

Filter Options Date Helpers

Set Filter Defaults Clear Filter Values Cancel Request Submit Request

Filter	Value
DateOFFFROM	
DateOFFTO	
DateONFROM	
DateONTO	
Facility	
IncludeLOC	
Item	
LOCFROM	
LOCTO	
LPNFROM	
LPNTO	
Owner	
Status	
WHOOFF	
WHOON	
WMSLotFROM	
WMSLotTO	

I0002: Hit ENTER after entering filter values

Infor Global - Supply Chain Portal on http://dev.idxdev.com

Warehouse Management Reporting EDI

Connect Owners Customers Suppliers Carriers P.O.s Receipts Orders Items Balances Adjustments Holds History New Copy Edit Delete View Help Exit

Trading Partners Documents Inventory Actions

Owners	Customers	Suppliers	Carriers	P.O.s	Receipts	Orders	Items	Balances	Adjustments	Holds	History
Facility	Hold Key	Lot	LPN	Location	Status	Date On Hold	User Hold On	Date Off Hold	User Hold Off		
Singapore	0000000041			X10Y10Z083	CUSTOMS	2010-09-21	admin	2010-08-31	admin		
Singapore	0000000039			X01Y01Z005	PIHOLD	2010-08-31	wmsadmin	2010-08-31	admin		
Singapore	INSTALL004			RETURN	RETURN	2010-07-22	LocationFlag	2010-07-22	wmwhse1		
Singapore	INSTALL003			QC	QCREQ	2010-07-22	LocationFlag	2010-07-22	wmwhse1		
Singapore	INSTALL002			LOST	LOST	2010-07-22	LocationFlag	2010-07-22	wmwhse1		
Singapore	INSTALL001			DAMAGE	DAMAGE	2010-07-22	LocationFlag	2010-07-22	wmwhse1		

To view the detailed Hold Document view, select the appropriate Hold and click 'View'.



Owner	Item	WMS Lot	LPN	Quantity	Allocated	Picked	Status
SYBEX	0470621974	0000000223	ID000001...	3	0	0	HOLD

Hold Header information displays in the tabs on the doc header left pane. General information is available on the Hold reference information, including primary key information Facility, Hold Status, the Date and user who placed the hold on and off. The Detailed section in the General tab under that will relate to the specific hold information depending on the type of hold.

If it is a Location Hold, the Location will be populated.

Location Hold

Location: X01Y01Z005

If it's a product hold (LOT or ID) then the Item Information will be populated.

Item Information

Owner: OREILLY

Item: 83726387698

Item Description: Professional C# Programming G.

Volume: 1.23

If the hold is a WMS LOT hold, then the LOT number will be populated



Hold Detail

WMS Lot: 0000203948

LPN:

If it's a pallet hold, the LPN will be populated

Hold Detail

WMS Lot:

LPN: ID00000028932

Line Level information from the Hold is displayed in the Lines tab on the right. This will depend on the type of hold. For example a LOT hold will display all other LOT information, if it's a LOC hold, then it will display all other items in that LOC.

ITEM DETAIL INFORMATION

Lines Catch Weight / Data UDF / Notes Attachments

Owner	Item	WMS Lot	LPN	Quantity	Allocated	Picked	Status
SYBEX	0470621974	0000000223	ID000001...	3	0	0	HOLD

History

The History Submit Refresh button will return all appropriate Items and transactional information restricted by User group, and any other appropriate details. Filter values are typically based around Facility, Owners, Items, Item Description, locations, ID/LPN's and effective dates (FROM and TO).

Filter

- EffectiveDateFR...
- EffectiveDateTO
- Facility
- ID
- Item
- ItemDescription
- LOC
- Owner
- TranType

10002: Hit ENTER after edit

Infor Global - Supply Chain Portal on http://dev.idx.dev.com

Warehouse Management Reporting EDI

Connect Owners Customers Suppliers Carriers P.O.s Receipts Orders Items Balances Adjustments Holds History New Copy Edit Delete View Help Exit

Trading Partners Documents Inventory Actions

Facility	Item Key	Tran Date	Owner	Item	Item Description	Transaction	Qty	WMS Key	Line	From Loc	To Loc	To ID	From ID
Singapore	000092244	8/11/2010 3:01:41 AM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Shipment	-1	0000007211	00001		X08Y022001	ID0000010044	
Singapore	000091478	8/11/2010 2:49:26 AM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Shipment	-1	0000005961	00004		X06Y012085	ID0000010194	
Singapore	000091462	8/11/2010 2:49:19 AM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Shipment	-1	0000005901	00001		X01Y012018	ID0000008670	
Singapore	000090693	8/11/2010 2:25:05 AM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Move	1	IDX	IDX	STAGE	X06Y012085	ID0000010194	ID0000010194
Singapore	000090684	8/11/2010 2:25:00 AM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Receipt	1	0000000076	00174		STAGE	ID0000010194	
Singapore	000089687	8/11/2010 2:11:50 AM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Move	1	IDX	IDX	STAGE	X08Y022001	ID0000010044	ID0000010044
Singapore	000089677	8/11/2010 2:11:44 AM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Receipt	1	0000000076	00166		STAGE	ID0000010044	
Singapore	000079977	8/9/2010 12:39:06 AM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Move	1	IDX	IDX	STAGE	X01Y012018	ID0000008670	ID0000008670
Singapore	000079949	8/8/2010 7:01:38 PM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Receipt	1	0000000076	00282		STAGE	ID0000008670	
Singapore	000078991	8/8/2010 6:05:36 PM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Shipment	-1	0000004126	00001		X09Y012033	ID0000008362	
Singapore	000077852	8/8/2010 4:54:57 PM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Move	1	IDX	IDX	STAGE	X09Y012033	ID0000008362	ID0000008362
Singapore	000077843	8/8/2010 4:54:38 PM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Receipt	1	0000000076	00026		STAGE	ID0000008362	
Singapore	000036208	8/7/2010 7:31:51 PM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Shipment	-1	0000001177	00001		X01Y012063	ID0000002976	
Singapore	000030832	8/7/2010 5:29:34 PM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Move	1	IDX	IDX	STAGE	X01Y012063	ID0000002976	ID0000002976
Singapore	000030826	8/7/2010 5:29:28 PM	QUE	B001RKON9K	Absolute Beginner's Guide to Project ...	Receipt	1	0000000050	00064		STAGE	ID0000002976	



In this view the inventory transactions from the selected data will display, ordered by transaction date descending. The transaction type will display along with appropriate WMS keys, Loc and ID data and quantity.

To view the detailed History view, select the appropriate Item and Facility and click 'View'.

From LPN	To LPN	From Loc	To Loc	Quantity	WMS Lot	Lot 01	Lot 02	Lot 03	Man Date
ID0000007179			X04Y012093	-1	0000000407				

Transaction Header information displays in the tabs on the doc header left pane. Information is available on The Item selected, Item description, Facility, weight and volume and warehouse pack information. The selected Transaction detail is displayed from the WMS Transaction history record. This includes the WMS Key, the transaction type, the original sourcekey (if it came from a document) and the WMS internal source type and date.

Depending on the type of transaction selected, the appropriate header tabs will be populated with further information

Receipt will detail the Receipt information, Orders will show the Order header information, Adjust/Moves will show transaction level information as this is a transaction without a matching sourcekey and document.



HISTORY DETAIL

General Receipts Orders Adjust/Move

Orders

Order Key: 0000007211

WMS Line: 00001

Ext Ref: BBKDE1008081854210815

Customer Code: BBKDE

Customer Name:

Ship Date: 8/11/2010 3:01:41 AM

Line Level information from the Item/Facility is displayed in the Lines tab on the right. All details from the WMS inventory transaction table are displayed highlighting the to and from ID/LPN, Loc, WMS Lot, quantity and the appropriate WMS lot attribute values (i.e. Batch #, COO, Manufacturing Date, Expiry Date etc)

ITEM HISTORY INFORMATION

Lines Catch Weight / Data UDF / Notes Attachments

From LPN	To LPN	From Loc	To Loc	Quantity	WMS Lot	Batch #	COO	Man Da
	ID0000010044		X08Y02Z001	-1	0000000517			

There are no edit or insert functions for History.



Adding or Editing Data in the Portals

New Items

If you have security permission, you will have the 'New' button enabled on the Item tab.



To add a new Item Master, select the 'Items' tab, Click the 'New' button.

This will open up the new Item entry screen. This screen is configurable by user group, so your display may look different to the sample provided here. Enter the appropriate information into the entry screen.

The screenshot shows the 'Item Maintenance' window with the following fields and controls:

- Master Data** tab selected.
- Buttons: Submit, Copy Lookup Data, Close.
- Section: ITEM MAINTENANCE
- Sub-sections: Item, Item Handling, Notes/Lottables.
- General Information**: Owner [Select], Active .
- Item Code**: [Text box]
- Description**: [Text box]
- Pack**: [Select], Manual Setup
- Weight and Volume**: Volume [Select], Gross Weight [Select], Net Weight [Select], Tare Weight [Select], Price \$ [Select].
- Reference Information**: Item Type [Select], Item Group [Text box], Item Group 2 [Text box], ABC [Select].
- Footer: Administrator|20110223 16:55:24 | Done.

Text boxes will accept all text, drop down lists will be populated from the code lookup tables.

BOLD items are generally marked as mandatory items so must be filled in.

Drop down lists are restricted by your User group and will display what information your user group is restricted to. Select the appropriate choices from the lists.



Item Group 2	
ABC	[Select]
Code	Value
A	Fast Mover
B	Average Mover
C	Slow Mover

In general the 'Item' tab of the data entry is to be filled or entered by the Portal User. The "Item Handling" tab displays the WM9 strategies, rules and settings needed for the WMS. These values are automatically populated by the WMS when the record is created (populated from Owner default values), but can be entered by the portal user if you have suitable permission.

ITEM MAINTENANCE

Item Item Handling Notes/Lottables

Handling Information

Carton Group STD

Freight Class Freight All Kinds

Transport Mode Less Than Trailer Load

Strategy Information

Putaway Strategy 215

Allocate Strategy STD2-Clean out all locations - order by location

Rotation FIFO

Rotate By [Select]

Code	Value
Lot	Lot
Lottable04	Lottable04
Lottable05	Lottable05

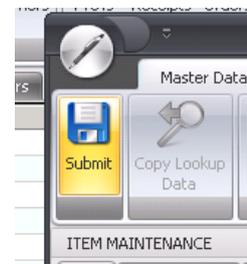
Administrator/201106

Currently removing or blanking existing data must be done by entering a dash '-' into the field you wish to block out. Sending an empty field through to the WMS will not erase the data, the WMS will treat this as a field not changed.

User defined fields and notes can also be entered.

When entry is complete, click the Submit button. Any Portals validation errors will be displayed.

The following shows a type of Portal validation error. The exact error and validation will be determined by the rules applied to the field you are entering in. In this example certain mandatory fields were not populated.





General Information

Owner MICROSOFT PRESS INC. ▾

Item Code ✖ |

Description ⚠ Item cannot be blank

Pack [Select] ▾

If successful, the entry should be reflected back in the list view.

Item Status

When submitting records to the WMS, they display as different colours depending on their status.

Black text is normal and represents valid data.

Green text indicates that the record is new in portals and has not been confirmed by the WMS as inserted correctly.

Facility	Owner	Item	Description
Singapore	MICROSOFT	3876438764	More of a Product

Red indicates that an insert or update error occurred. Users can open the record using the 'Edit' button and make any changes necessary and submit again. If it remains red, then an Administrator is needed to examine the logs and rectify this issue.

Edit Item

To edit an existing item, select it from the list view and use the Edit button to open the existing record in the data entry window. The values that are applied from the WMS are reflected back in the edit window. Changes can be made from the pop-up, then click Submit to update the appropriate WMS.





Item

Master Data

Submit Copy Lookup Data Close

ITEM MAINTENANCE

Item Item Handling Notes/Lottables

General Information

Owner MICROSOFT PRESS INC. Active

Item Code 3876438763

Description A Certain Description

Pack Standard Manual Setup

Weight and Volume

Volume 0

Gross Weight 0

Net Weight 0

Tare Weight 0

Price \$

Reference Information

Item Type Product is not COOL/BIO-Terrori...

Item Group STD

Item Group 2

ABC

Any Portals validation errors will be displayed.

If successful, the updated entry should be reflected back in the list view.

Copy Item via Edit button

To Copy an item, the edit windows can be used as above. Return the existing record, and make a change to the primary keys (i.e. Owner or Item Code) and submit the item again. It will create a new record in the WMS with those keys and values.



Facility	Owner	Item	Description	Item Group
Singapore	MICROSOFT	3876438763	A Certain Description	STD
Singapore	MICROSOFT	3876438763A	A Certain Description	STD
Singapore	MICROSOFT	B003GZEFCK	Microsoft Windows 2000 Professional Resource Kit,2000 public	STD

New Trading Partner

If you have security permission, you will have the 'New' button enabled on the for the appropriate Trading Partners tabs. The example below follow a Customer entry and edit, but the same process and logic applies for Suppliers and Carriers also.



To add a new Customer, select the 'Customers' tab, Click the 'New' button.

This will open up the new Customer entry screen. This screen is configurable by user group, so your display may look different to the sample provided here. Enter the appropriate information into the entry screen.



Customer

Document

Submit Copy Lookup Data Close

CUSTOMER MAINTENANCE

General Contact Billing Address Notes/UDF

Customer Information

Customer
Company
Description
Value Added ID

Address Information

Address 1
Address 2
Address 3
Address 4
City
State Postcode
Country ISO Country [Select]

Administrator | 20110223 17:11:32 | Done.

Text boxes will accept all text, drop down lists will be populated from the code lookup tables.

BOLD items are generally marked as mandatory items so must be filled in.

Drop down lists are restricted by your User group and will display what information your user group is restricted to. Select the appropriate choices from the lists.



Customer

Document

Submit Copy Lookup Data Close

CUSTOMER MAINTENANCE

General Contact Billing Address Notes/UDF

Customer Information

Customer: BBK3333
 Company: Generic Customer 3333
 Description:
 Value Added ID:

Address Information

Address 1: 123 Street
 Address 2: Level 24
 Address 3:
 Address 4:
 City: Singapore
 State: Singapore Postcode: 123456
 Country: Singapore ISO Country: Singapore

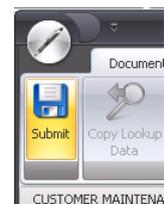
Code	Value
SMR	San Marino
STP	Sao Tome and Principe
SAU	Saudi Arabia
SEN	Senegal
SYC	Seychelles
SLE	Sierra Leone
SGP	Singapore
x	

Administrator | 20110223 17:11:32 | Done.

Currently removing or blanking existing data must be done by entering a dash '-' into the field you wish to block out. Sending an empty field through to the WMS will not erase the data, the WMS will treat this as a field not changed.

Contact Information, Billing Address and user defined fields and notes can also be entered.

When entry is complete, click the Submit button. Any Portals validation errors will be displayed.



The following shows a type of Portal validation error. The exact error and validation will be determined by the rules applied to the field you are entering in. In this example certain mandatory fields were not populated.

Customer Information

Customer ✖

Company: Generic Customer 3333

Description: Customer Code cannot be blank

If successful, the entry should be reflected back in the list view.



Trading Partner Status

When submitting records to the WMS, they display as different colours depending on their status.

Black text is normal and represents valid data.

Green text indicates that the record is new in portals and has not been confirmed by the WMS as inserted correctly.

	BBK00001	BORDER'S SUPERSTORE - SINGAPORE	ION PLAZA
	BBK003333	GENERIC CUSTOMER 3333	123 STREET
	BBK00000	BORDER'S SUPERSTORE - ST. MICHAEL	9500 KIRK TEST A

Red indicates that an insert or update error occurred. Users can open the record using the 'Edit' button and make any changes necessary and submit again. If it remains red, then an Administrator is needed to examine the logs and rectify this issue.

	BBKAP01	Test co	
	BBK00000	BORDER'S SUPERSTORE - ST. MICHAEL	9500 KIRK TEST A

Edit Trading Partner

To edit an existing Trading Partner, select it from the list view and use the Edit button to open the existing record in the data entry window. The values that are applied from the WMS are reflected back in the edit window. Changes can be made from the pop-up, then click Submit to update the appropriate WMS.



The screenshot shows a software window titled "Customer" with a "Document" menu and buttons for "Submit", "Copy Lookup Data", and "Close". Below these is the "CUSTOMER MAINTENANCE" section with tabs for "General", "Contact", "Billing Address", and "Notes/UDF". The "General" tab is active, displaying "Customer Information" and "Address Information".

Customer Information		Address Information	
Customer	BBK003333	Address 1	123 STREET
Company	GENERIC CUSTOMER 3333	Address 2	LEVEL 24
Description		Address 3	
Value Added ID		Address 4	
		City	SINGAPORE
		State	SINGAPORE
		Postcode	123456
		Country	SINGAPORE
		ISO Country	Singapore

At the bottom of the window, it says "Administrator | 20110223 17:28:03 | Done."

Any Portals validation errors will be displayed.

If successful, the updated entry should be reflected back in the list view.



Copy Trading Partner via Edit button

To Copy a Trading Partner, the edit windows can be used as above. Return the existing record, and make a change to the primary key (i.e. Customer) and submit the Trading Partner again. It will create a new record in the WMS with those keys and values.

New Documents

If you have security permission, you will have the 'New' button enabled on each appropriate document tab.

All documents are handled through the same methods and steps. The following shows a Receipt entry/edit, but the same steps and process can be followed for Purchase Orders and Shipment Orders.

Portals handles documents and document details separately. To create a new document, you need to create a Header record first. After creating a header record the document view will open where detail lines items can be added.



To only add detail lines or edit existing line items, this can be done directly from the Document view (Select the Record from the list view and click the 'View' button)

To add a new document, select the appropriate tab (i.e. Receipts) , Click the 'New' button.

This will open up the new document entry screen. This screen is configurable by user group, so your display may look different to the sample provided here. Enter the appropriate information into the entry screen.



Text boxes will accept all text, drop down lists will be populated from the code lookup tables, date formats and date helpers will allow for easy entry of dates, and list views will allow lookups and searches of data.

BOLD items are generally marked as mandatory items so must be filled in.

Dates will be formatted in the local user date settings, and will display local time. (This date/time will be converted to UTC datetime when inserting into the WMS). Dates can be enter manually, or using the date calendar.

Date Information

Expected Date

Scheduled Ship Date

Actual Ship Date

Date Created

Receipt Date

23 February 2011

February 2011

Mon	Tue	Wed	Thu	Fri	Sat	Sun
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	1	2	3	4	5	6
7	8	9	10	11	12	13

Clear

Drop down lists are restricted by your User group and will display what information your user group is restricted to. Select the appropriate choices from the lists.

General Information

Facility [Select]

Owner

Code	Value
WMPRD_wmwhse1	Singapore
WMPRD_wmwhse2	Dallas
WMPRD_wmwhse3	Japan

Delivery x ...

Lookup fields are indicated by the three dots in an edit field.

Supplier Code

Supplier Name

By clicking these dots, Portals will open a filter window to search for matching records.

Enter any filters in then select the 'Submit Request' button.



er Information

de

ne

ss Information

s 1

s 2

s 3

s 4

ity

ite Postcode

ISO Country [Select]

ne

ne

mail

Supplier Code

Filter Options Date Helpers

Set Filter Defaults Clear Filter Values Cancel Request Submit Request

Filter	Value
Address1	
City	
Contact	
Country	
State	
SupplierCode	
SupplierName	
Zip	

10002: Hit ENTER after entering filter values

Portals will return a list of matching records. Select the record you wish to populate back in to the edit form, and click the 'Copy Lookup Data' button. To rerun the lookup, click close and go back to the edit field you were looking up, and click the three dots again.

Receipt Document

Submit Copy Lookup Data Close

RECEIPT MAINTENANCE

Receipt	Supplier	Carrier	Notes/User Defined Fields	Lookup Supplier Code
ICYBR	Intellycyber Ltd.			03-05 Park East
SUP01	CG TEST SUPPLIER			

In this receipt example, you can also look up carrier details as well. For any field whether it has been returned from a lookup or entered previously, you can modify, amend or add as needed.

Receipt Document

Submit Copy Lookup Data Close

RECEIPT MAINTENANCE

Receipt Supplier Carrier Notes/User Defined Fields Lookup Supplier Code

Supplier Information

Supplier Code

Supplier Name

Address Information

Address 1

Address 2

Address 3

Address 4

City

State Postcode

ISO Country

Contact Name

Contact Phone

Contact Email

Currently removing or blanking existing data must be done by entering a dash '-' into the field you wish to block out. Sending an empty field through to the WMS will not erase the data, the WMS will treat this as a field not changed.

User defined fields and notes can also be entered.



Warehouse Management Portal on 11/15/2011 7:01:00 PM

Receipt

Receipt Document

Submit Copy Lookup Data Close

RECEIPT MAINTENANCE

Receipt Supplier Carrier Notes/User Defined Fields Lookup Carrier Code

Notes

UDF 1

UDF 2

UDF 3

UDF 4

UDF 5

When entry is complete, click the Submit button. Any Portals validation errors will be displayed.

The following shows a type of Portal validation error. The exact error and validation will be determined by the rules applied to the field you are entering in. In this example certain mandatory fields were not populated.

General Information

Facility [Select]

Owner X [Select]

External Key

ASN Type [Select]

WMS Key



Once submitted, the Document View will open for allowing Detail lines editing and adding (see section below).

Note: The WMS generated keys are created after the original submission so they may not initially show in the document view until it has been refreshed and opened again.

If successful, the entry should be reflected back in the list view. The List view is not automatically refreshed, so you will need to list the documents again to see it on the view.

Document Status

When submitting records to the WMS, they display as different colours depending on their status.

Black text is normal and represents valid data.

Green text indicates that the record is new in portals and has not been confirmed by the WMS as inserted correctly.

Facility	WMS Ref	Owner	External #	Status	Type	St
Singapore		MICROSOFT	36764288	New	Normal	
Singapore	0000000308	MICROSOFT	36764287A	New	Normal	

Red indicates that an insert or update error occurred. Users can open the record using the 'Edit' button and make any changes necessary and submit the document again. If it remains red, then an Administrator is needed to examine the logs and rectify this issue.

Dallas	000000041	MICROSOFT	CJGU800	New	Normal	
Japan	000000028	MICROSOFT	20101207113500000000...	New	Return to Store	SUP

Edit Document Header

Edit button will open the existing record in the data entry window. The values that are applied from the WMS are reflected back in the edit window. Changes can be made from the pop-up, then click Submit to update the appropriate WMS.





Receipt

Receipt Document

Submit Copy Lookup Data Close

RECEIPT MAINTENANCE

Receipt Supplier Carrier Notes/User Defined Fields

General Information

Facility Singapore

Owner MICROSOFT PRESS INC.

External Key 36764287

ASN Type Normal

WMS Key 0000000301

Receipt Status New

Reference Information

Purchase Order

Vendor Ref #

Warehouse Ref #

Container Ref #

RMA Number

Date Information

Expected Date 2011-02-21 00:00:00

Scheduled Ship Date

Actual Ship Date

Date Created 2011-02-19 03:44:41

Receipt Date 2011-02-18 11:44:47

Delivery Information

Loading Place

Discharge Place

Delivery Place

Origin Country American Samoa

Destination Country Bahrain

Transportation Mode Ship

Delivery Terms

Payment Terms

Default values that are applied by the WMS will be reflected in the edit window. These values can be changed by the portal user then submitted back to the WMS.

When attempting to submit, any Portals validation errors will be displayed.

If successful, the updated entry should be reflected back in the list view.

Copy Document via Edit button

To Copy a document, the edit windows can be used as above. Return the existing record, and make a change to the primary keys (i.e. Facility, Owner or External Key) and submit the document again. It will create a new record in the WMS with those keys and values.



Receipt Document

Submit Copy Lookup Data Close

RECEIPT MAINTENANCE

Receipt Supplier Carrier Notes/User Defined Fields

General Information

Facility: Singapore
 Owner: MICROSOFT PRESS INC.
 External Key: 36764287a
 ASN Type: Normal
 WMS Key: 0000000301
 Receipt Status: New

Reference Information

Purchase Order:
 Vendor Ref #:
 Warehouse Ref #:
 Container Ref #:
 RMA Number:

Delivery Information

Loading Place:
 Discharge Place:
 Delivery Place:
 Origin Country: American Samoa
 Destination Country: Bahrain
 Transportation Mode: Ship
 Delivery Terms:
 Payment Terms:

Date Information

Expected Date: 2011-02-21 00:00:00
 Scheduled Ship Date:
 Actual Ship Date:
 Date Created: 2011-02-19 03:44:41
 Receipt Date: 2011-02-18 11:44:47

Administrator | 20110223 17:36:50 | Done.

Facility	WMS Ref	Owner	External #	Status	Type	Supplier Code	Supplier Name	Carrier
Singapore	0000000308	MICROSOFT	36764287A	New	Normal			UPS
Singapore	0000000301	MICROSOFT	36764287	New	Normal			UPS

NOTE: the Document window that immediately pops up for the line edit is the ORIGINAL document, not the new document. Please refresh the list view and open the new copied document to add line items.

NOTE2: The document created above has only copied the header record. Line items still need to be created through the document view.



Delete Document

Clicking the Delete button, the selected record will be deleted from the Portals and the WMS. Any errors deleting the document from the WMS, will display the document record with a red strikethrough test.



Singapore	0000000227	APR13	APU	NEW	Normal
Japan	0000000026	MICROSOFT	AP13	New	Normal
Tapan	00000000??	ADTEL V	AD1?	New	Normal

These will require manual deleting from the WMS, and the document to be flagged deleted in the portals database by an administrator.

Document View

Once a List view has been returned, users will select an appropriate record and then click 'VIEW' to open that record in a new window.



The Document view in most cases will also trigger after editing / creating a new Document header record.

The Window will open and display the Document Header portion in the left pane and the line tabs in the right. These values are configured by the Administrators on the Portal Server, and are appropriate to your user group.

The screenshot shows a software window titled "Document" with a toolbar containing icons for Submit, Add Detail Line, Print, Edit, Delete, Attach, View, and Close. The main area is split into two panes. The left pane shows document header information:

- References:** Facility: Singapore, WMS Key: 0000000086, Owner: MICROSOFT, External Key: 1008091308180194, Purchase Order:
- Flags:** Status: In Receiving, Receipt Type: Normal
- Dates:** Date Created: 8/9/2010 5:10:35 AM, Last Receipt Date: 8/17/2010 2:33:51 PM, Expected Date: 8/9/2010 5:10:36 AM, Actual Ship Date:, Planned Ship Date:, Advice Date: 8/9/2010 5:10:36 AM, Advice Date:
- Weights and Measures:** Qty. Expected: 768, Qty. Received: 233, Expected Weight: 0, Actual Weight: 0

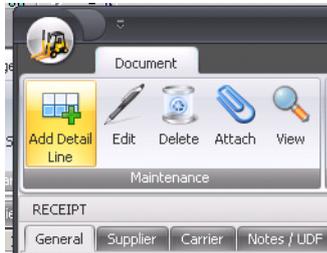
The right pane, titled "RECEIPT DETAIL LINES", contains a table with columns: Line, Item, Description, Expected, Received, UOM, Pack, Status. It lists various Microsoft software items such as "Microsoft Office Excel 2007: Data Analysis and...", "The Fourth Paradigm: Data-Intensive Scientific...", "Windows Server 2008 Administrator's Pocket C...", "MCTS Self-Paced Training Kit (Exam 70-536): ...", "MCITP Self-Paced Training Kit (Exam 70-646): ...", "CLR via C# (Dev-Pro)", "Windows 7 Inside Out", "Beyond Bullet Points: Using Microsoft® Office ...", "Microsoft Office Access 2007 Inside Out (Micro...", "Working with Microsoft Dynamics(TM) CRM 4.0", "MCITP Self-Paced Training Kit (Exams 70-640, ...", "Microsoft Office 2010 Inside Out", "Windows 7 Step by Step (Step By Step (Micro...", "MCTS Self-Paced Training Kit (Exam 70-503): ...", "Windows® Internals: Including Windows Serv...", "Microsoft SQL Server 2008 MDX Step by Step (...", "Microsoft Project 2010 Step by Step (Step By ...", "Microsoft Visual Basic 2010 Step by Step (Step ...", "MCTS Self-Paced Training Kit (Exam 70-432): ...", "Microsoft Exchange Server 2010 Administrator'...", "MCTS Self-Paced Training Kit (Exam 70-433): ...", "Microsoft Office PowerPoint 2007 Step by Step...", "Microsoft Office Excel 2007 Step by Step (Step...", "Active Directory Administrator's Pocket Consu...", "Windows 7 Resource Kit", "Microsoft Excel 2010 Step by Step (Step By St...", "Code Complete: A Practical Handbook of Softw...", "Microsoft Office Excel 2007 Step by Step (Step...



Data is now available to be browsed appropriate to the document or inventory chosen, and your user group requirements.

Document Add Detail Line

To add new line items to the Document, click the 'Add Detail Line' button.



The Line Item edit window will appear. This screen is configurable by user group, so your display may look different to the sample provided here. Enter the appropriate information into the entry screen.

Receipt Lines

Receipt Line Items

Submit Copy Lookup Data Close

RECEIPT ITEM MAINTENANCE

Receipt Detail

General Information

WMS Line # -

Extern Line #

Item

Qty Expected UOM

Pack Key

Qty Received 0

UDF 1

UDF 2

UDF 3

UDF 4

UDF 5

Notes

LPN Information

LPN

Hold Code

QC Required

Location

Lot Attribute Information

Lottable01

Lottable02

Lottable03

Manufacturing Date

Expiry Date

Lottable06

Lottable07

Lottable08

Lottable09

Lottable10

Delivery By Date

Best By Date

Administrator | 20110223 18:31:49 | Done.

Text boxes will accept all text, drop down lists will be populated from the code lookup tables, date formats and date helpers will allow for easy entry of dates, and list views will allow lookups and searches of data.

BOLD items are generally marked as mandatory items so must be filled in.



Extern Line #
Item

Drop down lists are restricted by your User group and will display what information your user group is restricted to. Select the appropriate choices from the lists.

Hold Code [Select]

Code	Value
BA	BA
CUSTOMER	CUSTOMER
CUSTOMS	Customs
DAMAGE	Damage
EXPIRED	Expired
OK	OK
OTHER	Other
x	

Lookup fields are indicated by the three dots in an edit field.

Receipt Detail

General Information

WMS Line # -

Extern Line #

Item

Qty Expected UOM [Select]

Pack Key [Select]

Qty Received 0

By clicking these dots, Portals will open a filter window to search for matching records.

Enter any filters in then select the 'Submit Request' button.

Receipt Lines

Receipt Line Items

Submit Copy Lookup Data Close

RECEIPT ITEM MAINTENANCE

Receipt Detail

General Information

WMS Line # -

Extern Line #

Item

Qty Expected UOM [Select]

Pack Key [Select]

Qty Received 0

UDF 1

UDF 2

UDF 3

UDF 4

UDF 5

Notes

Lottable09

Lottable10

Delivery By Date

Best By Date

Filter Options Date Helpers

Set Filter Defaults Clear Filter Values Cancel Request Submit Request

Filter	Value
Item	
ItemDescription	
ItemGroup	
Owner	MICROSOFT

10002: Hit ENTER after entering filter values

Portals will return a list of matching records. Select the record you wish to populate back in to the edit form, and click the 'Copy Lookup Data' button. To rerun the lookup, click close and go back to the edit field you were looking up, and click the three dots again.



Receipt Line Items

Submit Copy Lookup Data Close

RECEIPT ITEM MAINTENANCE

Receipt Detail Lookup Item

Facility	Owner	Item	Description
Sing...	MICROSOFT	CJG800	Test 800
Sing...	MICROSOFT	3876438763	A Certain Descripti
Sing...	MICROSOFT	3876438763A	A Certain Descripti
Sing...	MICROSOFT	CJG009	A Generic Product
Sing...	MICROSOFT	CG007	A CG007 Product
Sing...	MICROSOFT	365736537	A Generic Product
Sing...	MICROSOFT	CJG9002	CJG 9002
Sing...	MICROSOFT	CG008	CG0008
Sing...	MICROSOFT	3876438764	More of a Product
Sing...	MICROSOFT	0735627088	MCTS Self-Paced T

Extern Line #

Item 3876438764

More of a Product

Currently removing or blanking existing data must be done by entering a dash '-' into the field you wish to block out. Sending an empty field through to the WMS will not erase the data, the WMS will treat this as a field not changed.

When entry is complete, click the Submit button. Any Portals validation errors will be displayed.

The following shows a type of Portal validation error. The exact error and validation will be determined by the rules applied to the field you are entering in. In this example certain mandatory fields were not populated.



WMS Line # -

Extern Line #

Item 3876438764

External Line # cannot be blank

Note: The WMS generated line keys are created after the original submission so they may not initially show in the document view until it has been refreshed and opened again, or the next line is added. In the below screenshot, a second line was added. The detail line view was refreshed after submission, so the first line now displays the WMS generated line #.

ASN / Receipt

Document

Add Detail Line Edit Delete Attach View Receipt Summary Receipt Detail Inbound Tally Sheet Invoice Reports Close

RECEIPT

General Supplier Carrier Notes / UDF

References

Facility: Singapore

WMS Key:

Owner: MICROSOFT

RECEIPT DETAIL LINES

Line	Ext Line	Item	Description	Expected	Received	UOM	Pack	Status
-	0002	3876438763	A Certain Description	7780	0		STD	New
00001	0001	3876438764	More of a Product	450	0	EA	STD	New

If successful, the entry should be reflected back in the list view. The List view is not automatically refreshed, so you will need to list the documents again to see it on the view.



Document Line Status

When submitting records to the WMS, they display as different colours depending on their status.

Black text is normal and represents valid data.

Green text indicates that the record is new in portals and has not been confirmed by the WMS as inserted correctly.

Red indicates that an insert or update error occurred. Users can open the record using the 'Edit' button and make any changes necessary and submit the document again. If it remains red, then an Administrator is needed to examine the logs and rectify this issue.

Edit Document Detail Line

Edit button will open the existing line item in the data entry window. The values that are applied from the WMS are reflected back in the edit window. Changes can be made from the pop-up, then click Submit to update the appropriate WMS.

ASIN / Receipt
Receipt Lines

Receipt Line Items

Submit Copy Lookup Data Close

RECEIPT ITEM MAINTENANCE

Receipt Detail

General Information

WMS Line # 00001

Extern Line # 0001

Item 3876438764 ...
More of a Product

Qty Expected 450 UOM EA

Pack Key STD

Qty Received 0

UDF 1

LPN Information

LPN

Hold Code

QC Required No

Location QC

Lot Attribute Information

Lottable01

Lottable02

Lottable03

Default values that are applied by the WMS will be reflected in the edit window. These values can be changed by the portal user then submitted back to the WMS.

When attempting to submit, any Portals validation errors will be displayed.

If successful, the updated entry should be reflected back in the list view.



Copy Document Detail Line via Edit button

The ability to copy a document line using the edit function SHOULD NOT BE EXECUTED. This will modify the existing line in the portal database while creating a new line in the WMS. Synchronization will be needed to update this data between the systems.

Printing Reports

Each document view and inventory screen can have reports associated with it. Depending on your permissions the reports will be restricted to only your specified reports.

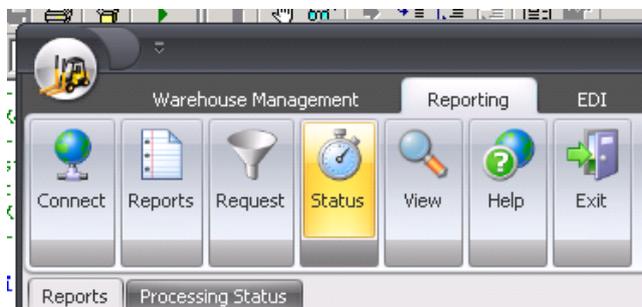
Select the document and report you wish from this screen (for example below is selecting the Receipt Summary Report to run).

Line	Ext Line	Item	Description
00002	0002	3876438763	A Certain Descri
00003	0003	3876438764	More of a Produ

The status bar at the bottom will display the job number assigned to this report request.



To view the report, click the reports tab, and then the Status button.



The Job ID and Job name will be displayed. Select the matching job id and click the View button.



Job ID	Job Name	Report Filters
12162	ASNRPT01	SerialKey=393, TimeZone=8
12049	Inventory Detail Report	Facility= Them= Owner=MICR

This will launch the viewer for the document. Depending on the type, this may open Excel, or browser or pdf, etc.

February 23, 2011 07:05:14PM
Facility: Singapore

Receipt Summary

Owner: MICROSOFT
WMS Receipt #: 000000309
External Key #: 38794298
External Key 2#: PO Key:
Status: New
Receipt Type: Normal

ReceiptGroup: Container Ref:
Warehouse Ref #: Supplier Key:
Supplier Name: INDO Terms:
PMT Terms:

Carrier Key: Carrier Name:
Carrier Ref: Origin Country:
Dest. Country: Transport Mode: Parcel
Vehicle Number:

Receipt Date(Last): 2011-02-24 01:58:59
Expected Date: 2011-02-24 01:58:59
Scheduled Date: Actual Date:
Arrival Date: 2011-02-24 01:58:59

Item	Description	Qty Expected	Qty Received	% Received
3879438783	A Certain Description	7,790.00	0.00	0.00
3879438794	More of a Product	450.00	0.00	0.00
Total:		8,240.00	0.00	

Page 1 of 1

Reports can also be printed directly from the Reports tab (see reports section below)



Attaching Documents

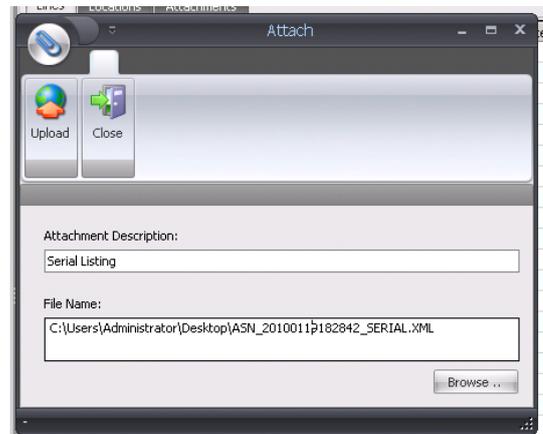
Documents from a user's local machine may be uploaded to the Portal server attached to master data setup or documents.



Choose the master data or document view you wish to attach the document, and then click the 'Attach' button.

The Attach pop up will be displayed.

Click the 'Browse' button and navigate the window to the document you wish to attach. The Filename should be unique as all documents are loaded in the same directory on the Portal server.



Enter a description in the field, and then click the Upload button. This will upload the document to the Portal Server. The status bar will reflect the transmission process as its being uploaded.



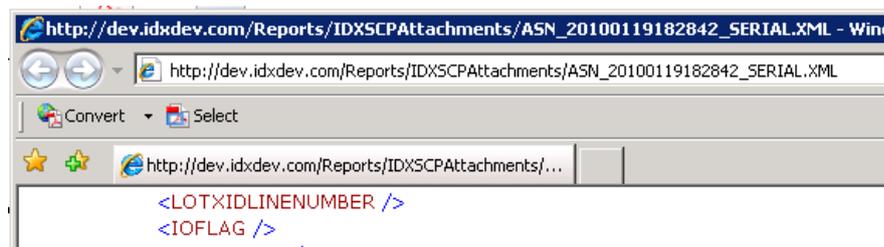
The Document will then be displayed in the Attachment tab on the documents.

File Name	Description	Upload Date	Added By
ASN_20100119182842_SERIAL...	Serial Listing	20100929 16:43:12	Borders User

To view, select the attachment, then click the 'VIEW' button from the document ribbon.



It will open the document in the appropriate viewer on your local machine.





Reports

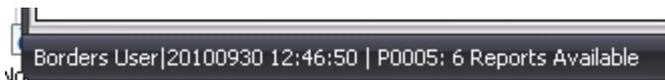
Each Portal user has the ability to access the list of reports available to use. These are restricted by security settings, so you can only see what you are given permission to see.

Click the Reports button in the menu ribbon bar.

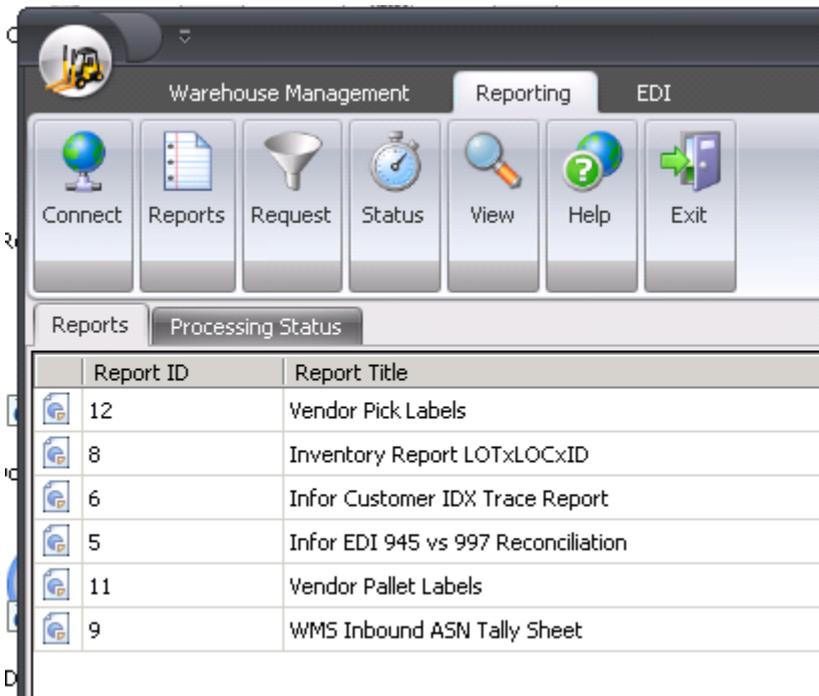


Setting up of this security is described in the Administration document.

The status bar at the bottom of the screen will summarize the number of reports available, and the report names themselves will appear in the Reports Tab.



The Report ID represents the unique report number configured by the IDX manager and is used to relate back to the setup for administrators.



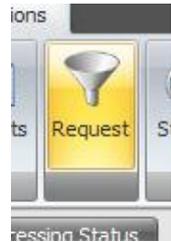


Requesting a Report

To run a report, simply select the desired report from the list by clicking the Report Title or Report ID. The status bar will update with the selected report.



Select the Request button from the menu ribbon to begin the process.



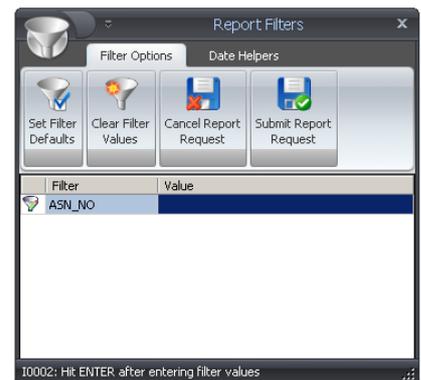
The Report Filters menu will appear.

Report Filters

The same filter process are used as with the Warehouse Management section.

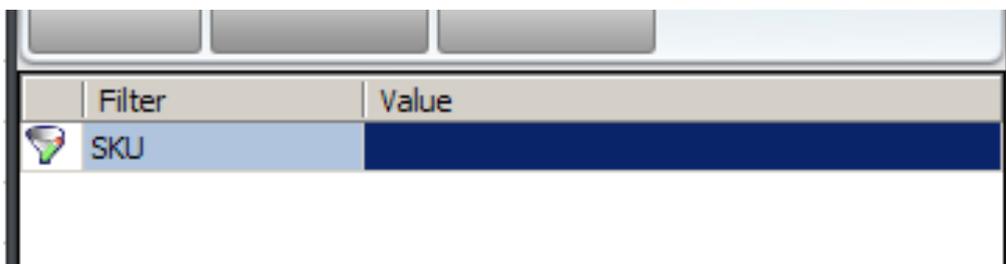
If the report has any values that must be passed in the report, these will appear as filter items in a list. If the report does not require any filter values the list will be empty.

Report filters are used to add parameters to a report, and are created when the report itself is designed. Examples of filters may be dates, document numbers, customer details, etc.



The filter needed will be displayed in the filter column, and the value will contain the user inputted data needed to run the report.

In the example below, a SKU is needed to retrieve all product information for that commodity. To enter this value, select the value and type in the required information.



It is important that you press ENTER after each value to 'lock it in'. You will see this by the value parameter being highlighted.



Filter	Value
SKU	18892883

Set Filter Values

The Save Filter values button is used to remember the currently entered value in the Value boxes. To use, enter the values you wish to be default, and then the Set Filter Values button. If all goes well, the status bar will display 'Filter Values Saved', and these values will be displayed when the report is requested next.

Date Helper

If the filter values require a date value, then the date helpers will assist in entering this information. Date Helpers will ensure that dates are always entered in the correct format for users to avoid conflicts with different countries formats.

Filter	Value
Begin_Date	2008/05/04 00:00:00
End_Date	

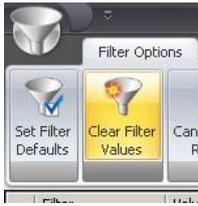
In the above example, a Begin Date and an End date are needed. By clicking in the date helper tab, users can select Yesterday, Today or Tomorrow. This will then put that date in the correct format in the filter space. You can manually change this value now if you need (i.e. to change to 18:00:00).

Notice that the format of the date is YYYY/MM/DD HH:MM:SS. This is a standard default date in Portal.

Click back on the Filter options tab to continue the "Submit Report Request"

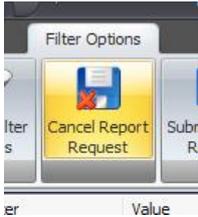
Clear Filter Values

If you wish to delete all values in the filters, select the Clear Filters button from the menu ribbon. This will remove all values.



Cancel Report Request

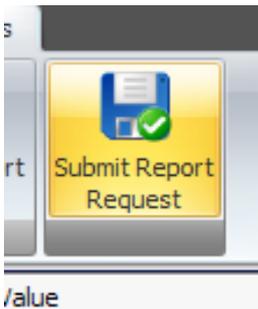
If you do not wish to run this report, select the cancel Report Request, or the 'X' in the top right hand corner.



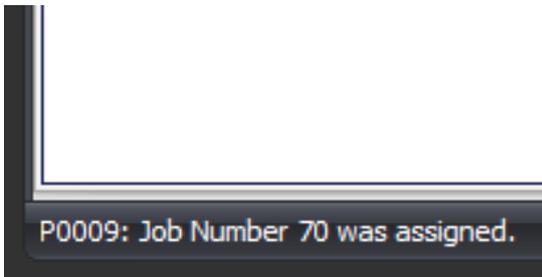
This will return you to the Reports Tab.

Submit Report Request

Once all necessary filter values have been added, select the Submit Report Request button from the menu ribbon. This will schedule the report job on the IDX server, which will then run.



The filter menu will close, and the status bar will update with the details of the job just created.



This job number can be used to monitor the job status as it runs.

The nature of IDX Reports

IDX reports will be available to view from the Portal client (as discussed below), but are part of a process that may include many functions, such as Skype alerting, and e-mailing. In this way the Submitting of a Report Request may actually do multiple steps, such as creating a report dataset in the data warehouse, creating a pdf report based on that data, and then emailing this report to a specified party.



Status

Once a report has been requested, it will appear in the status tab. To go here, simply select the Refresh icon 'Status' button in the menu ribbon. This screen is restricted to only display jobs that have been requested over the past 48 hours.



This will then 'Refresh' and then display the recent report jobs that have been run, as well as the filter values used, and the status of the report.

Job ID	Job Name	Report Filters	Status	Requested On
2631	WMS Inbound ASN Tally Sheet	ASN_NO=0000000086	Scheduled	Thu 30-Sep-10 14:09:14
2630	WMS Inbound ASN Tally Sheet	ASN_NO=0000000085	Running	Thu 30-Sep-10 14:09:06
2629	WMS Inbound ASN Tally Sheet	ASN_NO=0000000084	Completed	Thu 30-Sep-10 14:08:58
2628	Vendor Pick Labels	ExternalWaveKey=, SKU=, WaveKey=000009773	Completed	Thu 30-Sep-10 14:08:50
2627	Vendor Pallet Labels	ASN=0000000111, Item=, NumberLabels=, Warehouse=	Completed	Thu 30-Sep-10 14:08:41
2626	WMS Inbound ASN Tally Sheet	ASN_NO=0000000084	Completed	Thu 30-Sep-10 14:08:13
2624	WMS Inbound ASN Tally Sheet	ASN_NO=0000000084	Completed	Thu 30-Sep-10 12:58:33

In the status bar, the job just requested will still display, so it is easy to see current status of the report job.

Initially the job will be of a status 'Scheduled', which means it is queued to run on the appropriate IDX server. Scheduled

Once it has started on that machine, the status will show: Running

And once the report has been generated, the status will be: Completed

If the report running has an error or some other problem

(usually filter values do not match data in the source database)

the Status icon will display a red dot.



As displayed the Report Filters column shows the data entered in the filter popup when requesting the report.

To refresh the Status list, just click the Status button again.

Viewing a Report

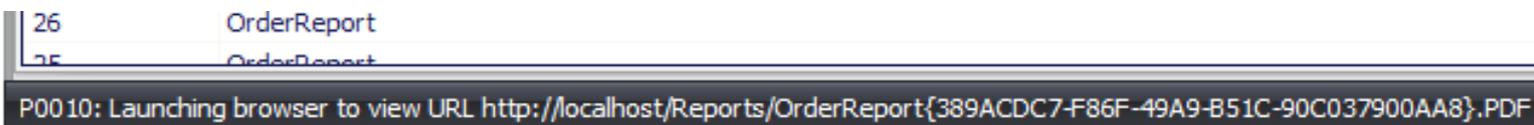
Once a report job has been completed, the report will be available for viewing.



To view the report, select the appropriate Job number from the status list, and then click the view button on the 'Refresh' menu bar.

Job ID	Job Name	Report Filters
2631	WMS Inbound ASN Tally Sheet	ASN_NO=0000000086
2630	WMS Inbound ASN Tally Sheet	ASN_NO=0000000085

If the report is available, it will display in the status bar of Portal



Where the Report name is appended a globally unique identifier for this particular job.

It will open the pdf report in a browser window (your default browser). If the report is an Excel or word file, it will ask you to confirm opening in Excel or word.

http://dev2008.idxdev.com/Reports/TallySheet%7B311FC46E-DC20-4D06-9CDA-B28386E2871C%7D.PDF - Windows Internet Explorer

http://dev2008.idxdev.com/Reports/TallySheet%7B311FC46E-DC20-4D06-9CDA-B28386E2871C%7D.PDF

Convert Select

http://dev2008.idxdev.com/Reports/TallySheet%7B3...

1 / 365 104% Collaborate Sign Find

INFOR Inbound Tally Sheet 9/30/2010 2:09:47PM Page 1 of 365

ASN: 0000000086 Receipt Date: 8/17/2010 2:33:51PM Client: MICROSOFT

Expected Date: 8/9/2010 5:10:36AM

WHP PO: 1008091308180194 Stockroom:

Department:

PO: 0000000284 Container #:

TallyMan: _____ Truck Arrival Time: _____

Start Time: _____ End Time: _____

Done Unknown Zone | Protected Mode: Off

The report can be then saved to your local machine, or printed out, as required.

If the report has been removed from the server, the status bar will show that the Report is not available. You must re-run the report. If the report will not generate, and you are entering the correct parameters, please contact your administrator.



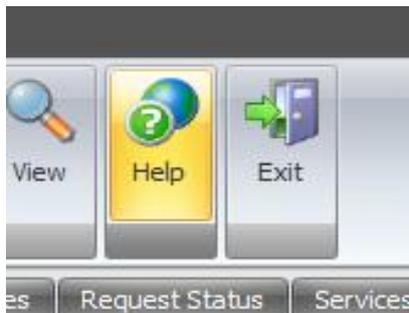
26	OrderReport
25	OrderReport

Report is not available

On line Documentation

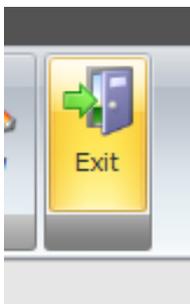
This guide can be downloaded from the Portal client as required.

To do this simply click the 'HELP' icon in the Refresh bar.



Exit

The application can be ended by selecting the Exit button from the menu bar, or by clicking the 'X' in the top right hand corner of the application.



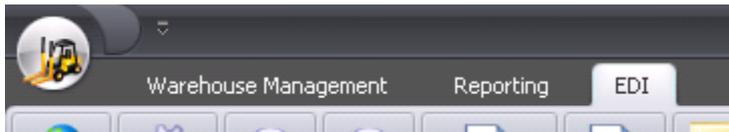


Portal EDI tab for Administrators

The Portal “EDI” tab holds information of the status, history and other information pertaining to the running of the IDX Schedulers. Permission must be granted to the user for them to see this tab and access the functionality.

It is assumed setup and configuration have been completed as specified in the Administrators guide.

Once the user has logged into the Portal application, selecting the “EDI” tab in the top will open the IDX Server Management functions.



Services



Selecting the refresh icon for services will pull down a list of all interface and report jobs from the Computer / scheduler combinations for your user.

Computer	Scheduler	Interface	Status	Next Run	Last Run	Schedule
UKFRNFSHA...	1	Receipt Confirmation - FIAT	Scheduled	Fri 18-Apr-08 18:35:01	Fri 18-Apr-08 18:34:56	5 Seconds
UKFRNFSHA...	1	ASN Import - COU1	Stopped	Fri 18-Apr-08 18:35:55	Fri 18-Apr-08 18:34:55	60 Seconds
chrislap	2	Inventory Balance Report	Scheduled	Tue 29-Apr-08 09:00:00	Mon 28-Apr-08 17:17:56	Daily 9 AM
chrislap	2	Interface Metric	Completed	Thu 01-Jan-99 00:00:00	Mon 07-Apr-08 13:58:40	On Demand
chrislap	2	ASN Enquiry Report	Completed	Thu 01-Jan-99 00:00:00	Thu 20-Mar-08 09:39:09	On Demand
chrislap	2	Inventory Balance Report	Completed	Thu 01-Jan-99 00:00:00	Mon 28-Apr-08 17:18:53	On Demand
chrislap	1	Receipt Confirmation - FIAT	Scheduled	Fri 18-Apr-08 18:35:01	Fri 18-Apr-08 18:34:56	5 Seconds
chrislap	1	ASN Import - COU1	Stopped	Fri 18-Apr-08 18:35:55	Fri 18-Apr-08 18:34:55	60 Seconds

This data will refresh every time you select the Services refresh icon.

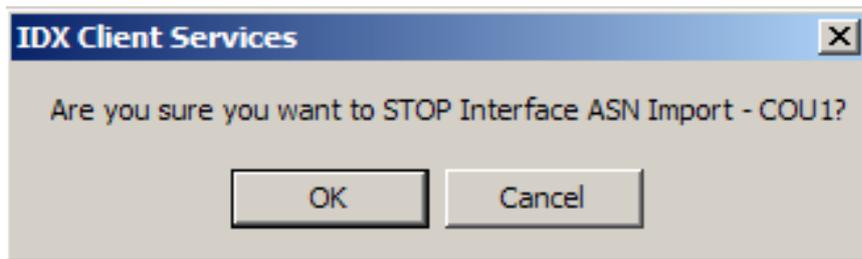
- Computer Name - Displays the Computer name configured in the DB above
- Scheduler – Shows the Scheduler number running on the Computer
- Interface – This displays the Interface Name that is setup in the Interface section of the IDX manager.
- Status – Will display the Status as at the last ‘refresh’ of the list of services. (this can be modified through the use of the Start Stop functions described below.
- Next Run – displays the date /time that the specified interface/report is next due to run.
- Last Run - displays the date/time that the specified interface/report last completed its run.
- Schedule - shows the schedule configured through the IDX manager.



Any of the interfaces can be stopped by the Administrator at any time. Simply select the interface desired to be stopped and click the 'Stop interface' Icon.



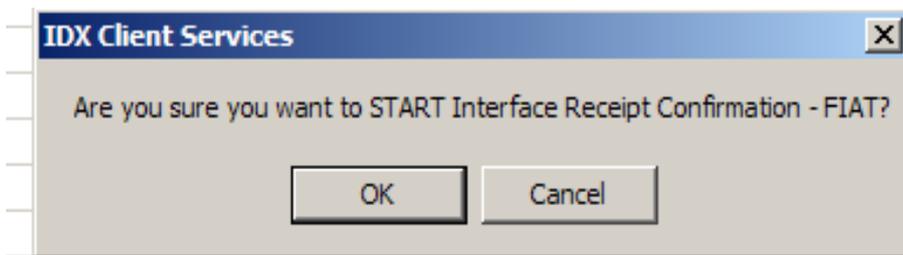
The client will ask you to confirm this function.



The interface or report will then be marked as "stopped" and will also remove itself from the IDXSchedulerApp it was assigned to. In this way the interface or report will not run again until the administrator starts the jobs.

Any manual jobs requested while it is stopped will be buffered until the service is started again. (i.e. if users requests reports, they will show as Scheduled for the users, and will run in requested sequence once the service is running.)

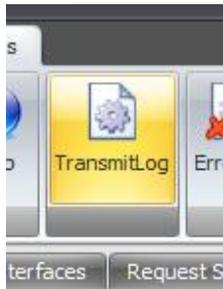
To Start any of the stopped interfaces, simply select the desired stopped interface and click the Start button in the refresh menu. After confirmed the start, the service will begin running again.





Transmitlog

The Transmit Refresh Icon will pull all new entries from the transmitlog table into the Portal client.



This will show the status of the last 500 transmitlog entries and their run status. This screen will be used to look at the history of the jobs which have been processed and if there are any errors or problems associated with that interface.

Interface	File Name	Status	Lines	Errors	Started	Ended
EAI1504	EAI_1504_8000_17092010_235001.csv	Success	6	0	Fri 17-Sep-10 23:50:01	Fri 17-Sep-10 23:50:07
EAI1504	EAI_1504_8000_17092010_234325.csv	Errors	22	21	Fri 17-Sep-10 23:43:27	Fri 17-Sep-10 23:43:30
Hold	HOLD201009171047.txt	Errors	6	6	Fri 17-Sep-10 13:27:37	Fri 17-Sep-10 13:27:38
Hold	HOLD201009171047.txt	Errors	6	6	Fri 17-Sep-10 13:26:06	Fri 17-Sep-10 13:26:07
Hold	HOLD201009171047.txt	Errors	7	7	Fri 17-Sep-10 13:22:50	Fri 17-Sep-10 13:22:51
Hold	HOLD201009171047.txt	Errors	6	6	Fri 17-Sep-10 13:21:35	Fri 17-Sep-10 13:21:36
Hold	HOLD201009171047.txt	Errors	6	6	Fri 17-Sep-10 13:19:03	Fri 17-Sep-10 13:19:26
Hold	HOLD201009171047.txt	Errors	6	6	Fri 17-Sep-10 13:08:49	Fri 17-Sep-10 13:09:52
Hold	HOLD201009171047.txt	Errors	7	7	Fri 17-Sep-10 12:57:52	Fri 17-Sep-10 12:58:32
EAI1504	EAI_1504_8000_CUST_24082010_194950.csv	Success	13	0	Tue 24-Aug-10 19:49:50	Tue 24-Aug-10 19:51:08
EAI1504	EAI_1504_8LZ_24082010_194526.csv	Errors	42	41	Tue 24-Aug-10 19:45:26	Tue 24-Aug-10 19:45:32
EAI1878	EAI_1878_8000_24082010_181958.csv	Success	6	0	Tue 24-Aug-10 18:19:58	Tue 24-Aug-10 18:20:03
EAI1878	EAI_1878_8000_24082010_181816.csv	Errors	6	3	Tue 24-Aug-10 18:18:16	Tue 24-Aug-10 18:18:20
EAI1878	EAI_1878_8000_24082010_180727.csv	Errors	6	3	Tue 24-Aug-10 18:07:27	Tue 24-Aug-10 18:07:49
EAI1878	EAI_1878_8000_24082010_180459.csv	Errors	288	287	Tue 24-Aug-10 18:04:59	Tue 24-Aug-10 18:05:49

The following defines the columns and what they mean:

- Interface – Will match the interface name configured in the IDX manager, and visible from the Services Tab.
- File Name – Will display the file name that was run in the interface. This file can then be retrieved via the folders functions (described below).
- Status – The status (and colour icon) will show if the interface had no errors (SUCCESS - green) or had any errors (ERRORS - yellow).
- Lines – the number of lines that have been read in the file.
- Errors – Displays the number of Errors that were detected by the IDX macro when running.
- Started – date/time that the interface began running
- Ended – date/time that the interface ended

These columns can be sorted by clicking in the title bar.

The next step is to drill down into the files with errors. To do this, select the Interface Name you wish to retrieve the error log for. And then press the ErrorLog button. This will return the error log entries for the combination interface name and file name.



Note: if you do not select any specific Transmitlog entry , Portal will return ALL Errors for the transmitlog entries.

This will open the Error Log screen, and the resulting Error log entries.



The fields displayed will then show the following fields:

- File Name – Matching the file name selected in the transmitlog screen (or all files if none were selected)
- Level – displays the Log Error level as defined in the settings in the IDX developer.
- Line – The Line number within the interface file that corresponds to the error registered above
- Log Message – This shows the error entered into the Error log table. Any validation errors will also be displayed here (if logging level is set correctly). Hint – Hover mouse over line to have the error message pop up.
- Log Date – Date/time the error was encountered

Use the combination of the Transmilog tab and the errorlog tab to diagnose problems with the interfaces and understand what errors are being encountered.

Remote Folder View

By Selecting the Folder Refresh icon, will return a list of the contents of the IDX folders. Users can then start to manage the contents of the folders, especially with regards to files which have had errors, or need to be reprocessed.





Data In			Archive		
File Name	Date	Size	File Name	Date	Size
C:\IDX4\DataIn\IDXFSchedApp.exe1	20090415 144606	147456	C:\IDX4\ARCHIVE\WO_20090324143656.txt	20090324 145415	3192
C:\IDX4\DataIn\WO_20090324143656.txt	20090324 145415	3192	C:\IDX4\ARCHIVE\ASN20090303123214.TXT	20090303 193331	126
C:\IDX4\DataIn\20090202_Infor_IDX_ICCS_Presentation.ppt	20090311 135110	6874112	C:\IDX4\ARCHIVE\ASN0000015.TXT	20090303 014045	129
C:\IDX4\DataIn\WM9.zip	20090304 000653	1149037	C:\IDX4\ARCHIVE\ASN0000014a.TXT	20090303 012825	129
C:\IDX4\DataIn\WO_20090225154812.txt	20090228 032603	3192	C:\IDX4\ARCHIVE\orders_20090224_17.21.53.xml	20090302 060935	1227
C:\IDX4\PROM\DATAIN\LEASN000001.TXT	20090225 013243	130	C:\IDX4\ARCHIVE\WO_20090225154812.txt	20090228 032603	3192
			C:\IDX4\ARCHIVE\SKU001.txt	20090227 175755	50
			C:\IDX4\PROM\ARCHIVE\orders_20090224_17.21.53.xml	20090225 195008	1229
			C:\IDX4\ARCHIVE\Create ORDER5.sql	20090225 024704	2620
			C:\IDX4\PROM\ARCHIVE\Create ORDER5.sql	20090225 024704	2620
			C:\IDX4\PROM\ARCHIVE\ASN0000015.TXT	20090225 012732	126
			C:\IDX4\PROM\ARCHIVE\ASN000001.TXT	20090302 064721	126

Data Out			Errors		
File Name	Date	Size	File Name	Date	Size
C:\IDX4\DATAOUT\REC00007378.txt	20090303 194050	118	C:\IDX4\ERRORS\ASN000001t.TXT	20090418 121659	129
			C:\IDX4\ERRORS\ASN20090303111617.TXT	20090303 192732	126
			C:\IDX4\ERRORS\ASN000001.TXT	20090302 064721	126

20090424 14:56:00 | P0022: Folder Listing complete.

By Definition these folders represent the following and their actual locations are defined in the IDXDataFolder SQL table

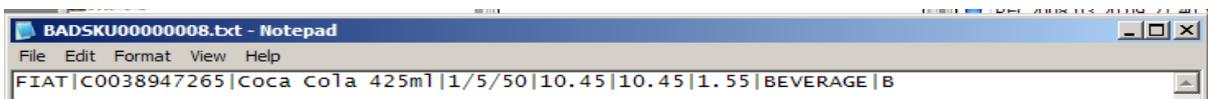
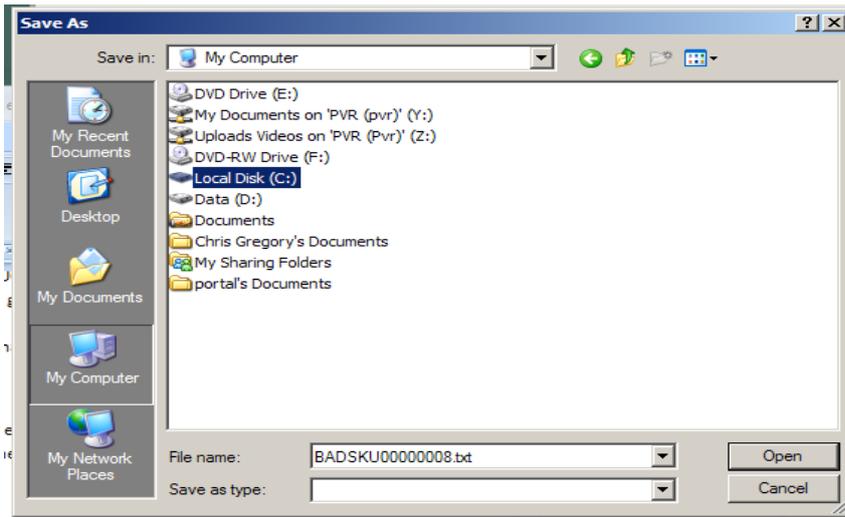
- Data in – The directory where inbound files are placed before processing
- Data Out – The directory where outbound files created by IDX will be placed.
- Archive – Directory where files that have been SUCCESSFULLY imported will be moved.
- Errors – This directory will contain any files that have had errors when importing. (i.e. related to the ErrorLog file name)

Downloading Files

Files from these directories can be downloaded to the user's computer. Simply select the file you wish to download and then the download button from the Refresh bar.



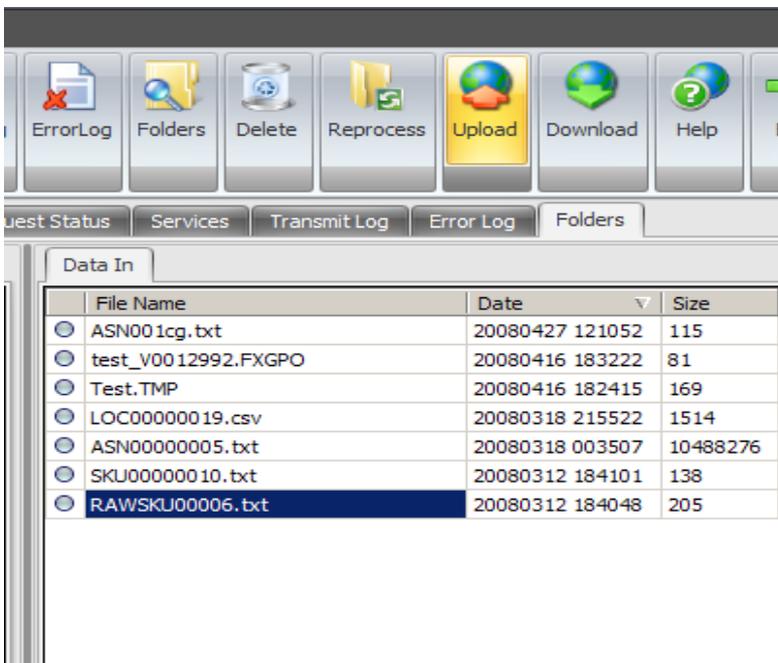
The file will prompt the user for the save location, and then immediately attempt to open it.



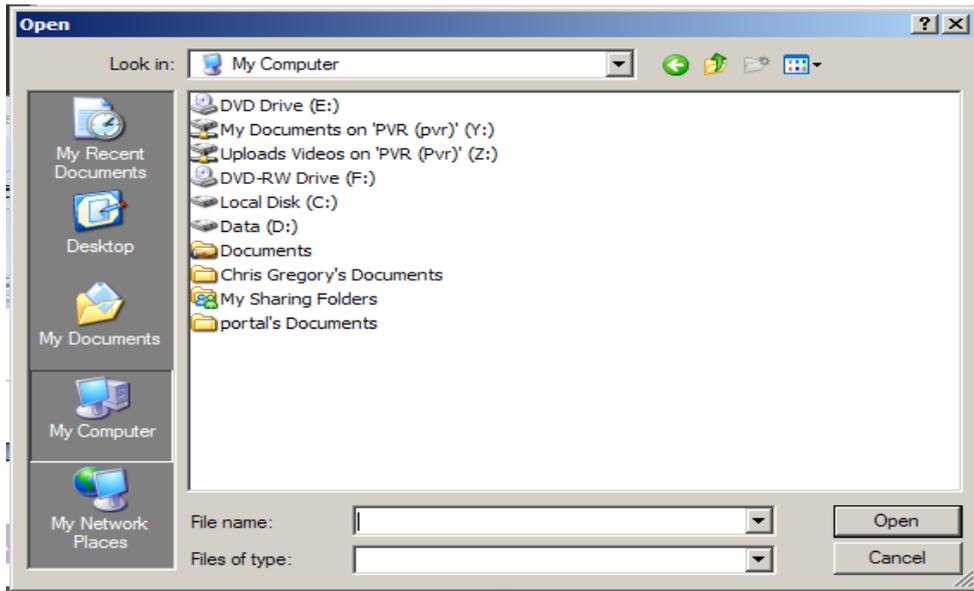
Uploading Files

Files can also be uploaded back to the Portal server. Usually this will be back into the datain directory for reprocessing, but can be uploaded into any directory the user selects (as long as it has been configured for uploads).

Select a file in the directory to upload into, then select the upload icon from the Refresh bar.



AN open file dialog box will appear. Navigate and select the appropriate file from your system.



Use the Refresh FOLDERS Icon to update the contents of the folders, and the file will now appear in the appropriate directory.

Data In			
	File Name	Date	Size
<input type="radio"/>	BADSKU00000008.txt	20080505 214137	69
<input type="radio"/>	ASN001cg.txt	20080427 121052	115
<input type="radio"/>	test_V0012992.FXGPO	20080416 183222	81
<input type="radio"/>	Test.TMP	20080416 182415	169

Troubleshooting

File not found error when select View from Reporting tab in Portal

Make sure that the file is being generated correctly. Ensure that the RunID being used is the same one for each step, and that the file name is called correctly. Also, check the IDXShedApp.exe.config to ensure paths are setup correctly. The File name can be found in the scheduledjobs table in the IDX database. Ensure this is the same as the generated file name.