LAWSON™

e-Procurement Administration Guide

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Procurement

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Contents

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Chapter 1

Using This Guide

The purpose of this user guide is to provide reference material for your daily use of the product and for your needs in Lawson training.

This user guide contains procedures on basic and advanced administration features of the product. In addition, it provides information to help you understand how to use each procedure for your business processes.

User Guide Conventions

This user guide uses specific text conventions, visual elements, and terminology.

Text Conventions

Lawson user guides use the following standard text conventions.

This	Represents
bold	A key name or a function key name. For example, **Shift** is a key name and **Help (F1)** is a function key name. A value or command that you must type exactly as it appears. A program name or a file name.
italics	A manual title or form name. An emphasized word or phrase. A placeholder for a user-defined value or variable. Follow the capitalization pattern of the placeholder. For example, "Type **$LAWDIR/print**/*username*/*jobname*/*stepnumber*/*FORMID***. prt"** instructs you to type the user name, job name, step number, and form ID as follows: **$LAWDIR/print/jane/emplist/1/GL100.prt**
(F1)–(F24)	A function key number. "Press **Help (F1)**" instructs you to press the key mapped for the **(F1)** function.
Key1+Key2	A key combination. "Press **Shift+FndNxt (F3)**" instructs you to press and hold down the **Shift** key and then press the **FndNxt (F3)** function key. Release both keys to complete the action.

This	Represents
[ ]	Optional parameters. You can type none, one, or more of the parameters within the brackets. For example, the command **qsubmit** [**-Un**] [**-j***JobQueue* **-d***Date* **-t***Time*] username jobname means that you can type a specific job queue, date, or time, or you can omit these parameters.
[|]	Optional parameters. You can type only one of the parameters separated by a vertical line. For example, the command **phraserpt**[**-n**|**t**] *BaseLanguage* [*Translation*] means that you can type either the **n** or **t** parameter; you cannot type both.
...	A parameter that can be repeated. For example, the command **scrgen** [**-scxvV**] *productline* [*systemcode* [*programcode*...]] means that you can type any number of program codes.

Visual Elements

Lawson user guides use the following visual elements.

STOP Information that must know before you attempt the procedure or process.

Need More Details? Check out the following concepts:

- Introduces a list of topics that provide additional or background information. Each item in the list includes a cross-reference to the information.

Application integration. Events, required actions, or other consequences that are related to other Lawson applications.

IMPORTANT Important information that you must consider when you perform the procedure.

CAUTION Cautionary information about actions that involve a risk of possible damage to equipment, data, or software.

WARNING Warning information about actions that involve a risk of personal injury or irreversible destruction to the data or operating system.

TIP Supplemental information about possible shortcuts to the procedure or your business process.

NOTE Supplemental information that might be of interest to you as you complete the procedure.

Terminology

The following terms have precise meanings in Lawson documentation.

Term	Meaning
access	Open a Lawson application form or subform.
choose	Start a process. "Choose Add" instructs you to click a button or a link on a form to add a record to the Lawson system.
click	Place the cursor over an object (such as a button, link, or tab) and press the left mouse button. **NOTE** This description applies to a standard PC mouse with standard settings. You must translate the meaning of "click" to what is appropriate for your equipment.
define	Use a Lawson form to create a new record for a company, a vendor, a class, a code, or another entity used throughout the Lawson system. – or – Specify configuration parameters, printers, security roles, data areas, and so on.
run	Send data for processing. For example, run a report or batch job.
select	Identify an item to process. Selecting an item does not start a process. To select an item, place the cursor over an item and then click. If you use character-based mode, highlight an item to select it. Sometimes, you must also press **Mark** or **Next** or choose **OK**.
type	Press keyboard keys to enter information in a field, then move the cursor to the next field. At a command line, type the letters exactly as written in the procedure, then choose **OK**.
OK	Choose OK to save or process the data that you entered on the current form. • "Choose OK" instructs you to click a button or a link on a form. An "OK" button might be labeled "Update" or show a check mark. An "OK" link might be labeled "OK." • "Choose **OK**" instructs you to press the keyboard key mapped as **Enter.**

Lawson Documentation and Support

Lawson offers several levels of support for its products, including several types of documentation as well as the Lawson Global Support Center help line.

- "Lawson Online Help" on page 10
- "Lawson Guides" on page 11
- "Installation Instructions and Release Notes" on page 11
- "Enhancement and Patch Documentation" on page 11
- "Lawson Global Support Center" on page 11
- "Lawson Software Documentation Contact" on page 12

Lawson Online Help

Online help is available for forms and sometimes for fields. How you access online help depends on the desktop or user interface you are using with the Lawson system. For more information, see the Getting Started manual for the desktop or user interface you are using.

Accessing online help for Lawson Desktop	Use this procedure if you need online help for Lawson Desktop itself, not for any of the Environment forms you may be accessing through it. See "To access online help for Lawson Desktop (LID)" on page 10.
Accessing online help for Environment forms	Use this procedure if you need online help for specific Environment forms. See "To access online help for Environment forms" on page 10.
Accessing online help for applications from within the Lawson Desktop	Use this procedure if you need online help for one of the Lawson applications and you are accessing the application forms through the Lawson Desktop. See "To access online help for applications from within the Lawson Desktop" on page 11.
Accessing online help for applications from the Lawson Portal	If you need online help for one of the Lawson applications and you are accessing the application forms through the Lawson Portal, see the instructions in the *Getting Started with Lawson Portal User Guide*.

STEPS

To access online help for Lawson Desktop (LID)

1. Start a Lawson Desktop session.
2. Click Help (the button with a question mark)

   – or –

   Select Help Topics from the Help menu.

STEPS

To access online help for Environment forms

1. From within Lawson Desktop, transfer to the Environment form you want to work with.

2. From within the form for which you want help, press **Help (F1).**

   The help text for the form or for a section of the form will be displayed.

STEPS **To access online help for applications from within the Lawson Desktop**

1. From within Lawson Desktop, transfer to the application form you want to work with.
2. For field level help, position the cursor in the field for which you want help and press **Help (F1)** or choose Field Help from the Help menu.
3. For form level help, select Form Help from the Help menu.

Lawson Guides

The Lawson Documentation library includes a full range of Lawson Guides or manuals on Environment and application topics. For a complete listing of the manuals, click on the Document Center link at the Lawson Global Support Center web site (support.lawson.com) and then click the Product Documentation link.

How you access Lawson documentation depends on which desktop or user interface you are using and on how you have installed the documentation. For instructions on how to install the documentation, click on the Document Center link at the Lawson Global Support Center web site (support.lawson.com), click Product Documentation, select a platform and release, and then click the Download button or link.

Installation Instructions and Release Notes

Lawson provides installation instructions and release notes for its products. When troubleshooting, please check the installation instructions and release notes to be sure you have installed the software correctly and have met all hardware and related software requirements.

Enhancement and Patch Documentation

When necessary, Lawson provides release- and platform-specific enhancements and patches. Lawson delivers these enhancements and patches in the form of maintenance service packs, interim cyclical patches, service packs, and so on. The documentation for these either accompanies them or is available through the Download Center of Lawson's Global Support Center web site.

Lawson Global Support Center

The Lawson Global Support Center (GSC) is available to all Lawson clients who purchased maintenance support for their Lawson products. The GSC help line is open Monday through Friday from 7:00 a.m. to 7:00 p.m. Central Standard Time. Emergency service is available after 7:00 p.m. and on weekends.

Help Line (main number)	800-695-9000
Help Line (New York State number)	800-888-3440
Help Line (United Kingdom number)	800-695-90000
Internet Help Line	http://support.lawson.com
email address	gsc@lawson.com
Fax (North America)	651-767-4931
Fax (Europe)	651-767-4931

Before you contact the Lawson GSC, you must collect the following information:

- Your client ID number
- Hardware type
- Product
- Release level
- Program number(s) in question
- The exact steps you performed prior to the problem occurring
- The specific error messages displayed on the form or report
- Any additional data such as reports, data file information, form prints, and so on.

How the GSC Help Line Works

When you speak with a product expert, your problem is recorded in an automated call tracking system. Lawson tracks the time of the call, when it was accepted by the product expert, notes regarding the call, and the time the call was completed. A call does not become completed until the question or problem is resolved.

If you would like to place an enhancement request for a Lawson product, please contact the Help Line with your suggestion(s). Enhancement requests are entered into an online enhancement tracking system and are reviewed and responded to by the appropriate Product Manager.

Lawson Software Documentation Contact

We welcome your questions or suggestions about Lawson's documentation. Please send comments to Lawson's Documentation Production Manager using the fax number or Internet mail address below.

Fax number	651-767-4931
Internet mail address	**documentation@lawson.com**

Documentation Contact

We welcome your questions or suggestions about Lawson documentation. Please send comments to

documentation@lawson.com

Chapter 2

e-Procurement Overview

This section describes the functionality and components of Lawson's e-Procurement product. The following sections will help you get started in administrating this product by helping you understand what the different components are and how they work together.

- "What Does e-Procurement Do?" on page 15
- "What Are the e-Procurement Components?" on page 16
- "How Do e-Procurement Components Work Together?" on page 18
- "What Is webMethods?" on page 19
- "What Is the webMethods Developer?" on page 20
- "What Is the Trading Networks Console?" on page 20
- "What is the Web Manager Window?" on page 20

What Does e-Procurement Do?

Lawson e-Procurement provides seamless integration and connectivity that automates and streamlines 360° business processes while enabling organizations to interact fully, and with maximum visibility both internally and across the globe. Lawson e-Procurement is a product that enables organizations to search multi-supplier, internet-based multimedia rich catalogs, create requisitions and purchase orders, and process transactions in real time within a fully integrated business solution environment.

Lawson e-Procurement enables users of Lawson Requisitions Self Service to order supplies from a specific vendor's web site. With e-Procurement, a vendor page is linked to a shopping icon (called Punchout) on the Requisitions Service Center home page. When the user chooses a specified vendor, that vendor's website catalog appears. From this catalog Requisitions Self Service users can choose items to order. By separate agreement between the customer and the vendor, the vendor can display the customer's special cost information for catalog items and can limit the catalog items that are displayed.

When users have filled their shopping carts (virtually speaking) and checked out from the vendor web site, the chosen items and their cost are returned to the Lawson server where a requisition is created using the Requisitions Self Service application. A purchase order is then created from the requisition. After the requisition is interfaced into the Lawson Purchase Order system, e-Procurement enables the transmission of purchase order documentation back to the vendor so that the vendor can fill the order.

Any purchase orders created from within Lawson as XML or EDI can be sent to the vendor via the Lawson EDI application or via webMethods integration. webMethods is a provider of integration software solutions for rapidly automating business processes within the enterprise and with trading partners across the Internet. They offer a comprehensive integration platform that forms a strong base on which to build a seamlessly integrated business network.

e-Procurement enables organizations to manage a complex mix of internal and external procurement information, providing connectivity to preferred trading partners and stakeholders, and delivering accurate, up-to-date data about the purchasing process. Our experience working with organizations has taught us that procurement is often inefficient and complex. We know that manual, fragmented and labor-intensive processes create a host of problems.

e-Procurement automates tasks associated the acquisition of products and services through the following features:

- **Punchout** Shopping on vendor managed websites through secure connectivity between Lawson requisitions and the systems of the trading partners and digital marketplaces that are exposed to the Internet.
- **Pre-built Connectivity** B2Bi (Business-to-business integration) is pre-built to an ever growing number of major trading partners. XML based “connectors” are downloadable from the Lawson support site.
- **Order Management** The submission or receipt of Purchase Orders, Purchase Order Acknowledgement, Advance Ship Notice, and Invoices unrelated to Punchout.
- **Web Manager** a view that allows Lawson customers to track their transactions from creation to fulfillment, providing visibility through B2Bi tools that enable outward integration.

What Are the e-Procurement Components?

e-Procurement uses various Lawson and 3rd-party components to create the Shopping Experience. These components include

- Lawson Requisitions, Inventory Control, Accounts Payable, and Purchase Order server applications

  You will set up these applications with basic information and processes necessary for requisition processing, such as the currency you will use, your accounting units and accounts, the names and locations of your vendors, your inventory locations and items, your requesters, and requesting locations.

  Requisitions. Before you can create requisitions, you must set up the Requisitions application, including requesters, requesting locations, and approval codes. The Requisitions Self-Service tab on Requester Maintenance (RQ04.1) allows you to define the tasks allowed in the Requisitions Self-Service application. For more information, see the Requisitions User Guide.

Inventory Control. The Requisitions Self-Service tab on Company (IC01.1) allows you to define the tasks allowed in the Requisitions Self-Service application. UNSPSC Product Codes (IC16.1) and Item Master (IC11.1) allow you to create an item hierarchy that enables user searches at each level, based on the UNSPSC codes developed by the United Nations in association with Dun & Bradstreet. The Search Catalog allows you to look up items and keywords in up to 28 origin fields determined by set up. Keywords and search criteria are defined in the Lawson Inventory Control application. For more information, see the Inventory Control User Guide.

Purchase Order. Purchase Order Vendors and Locations must be defined prior to using Requisitions Self-Service or submitting orders to Order Management Partners. Electronic Data Interchange (EDI) is defined as your PO Vendor Issue Method if your company is issuing purchase orders via EDI. The Punchout tab on PO Vendor Maintenance (PO10.1) and Vendor Purchase From Location (PO10.2) allows you to specify whether or not to allow changes to punchout items. For more information, see the Purchase Order User Guide.

Accounts Payable. Vendors must be set up in Vendor Maintenance (AP10.1) for processing. For more information, see the Accounts Payable User Guide.

- Lawson Requisitions Self-Service.

  The Requisitions Self-Service application lets you create requests with demand on stock and demand on vendors, and process, view, and modify requisitions. For more information, see the Requisitions Self-Service User Guide

- Lawson ProcessFlow.

  ProcessFlow (reqapproval1.flo and reqapproval2.flo) routes requisition approval requests to approvers. Each flow has up to six levels of approval, based on dollar amounts. You define approvers and dollar amounts according to their requirements for a company/requesting location. For more information, see the ProcessFlow User Guide and the ProcessFlow Reference Guide.

- Lawson e-Procurement Portal.

  The e-Procurement Portal is used by the e-Procurement administrator to define users, groups, and vendors, and set up their access to purchase orders. Bookmarks also allow the administrator to synchronize information between Lawson and webMethods, a 3rd-party product used in e-Procurement, and to define how purchase orders are transmitted to the vendor. This document describes concepts and procedures related to e-Procurement administration tasks.

- webMethods Integration Server components.

  These components manage users, groups, and vendors within the webMethods product and allow the administrator to track and troubleshoot purchase order processing. For more information, see the documentation provided by webMethods.

- Lawson Internet Object Services (IOS).

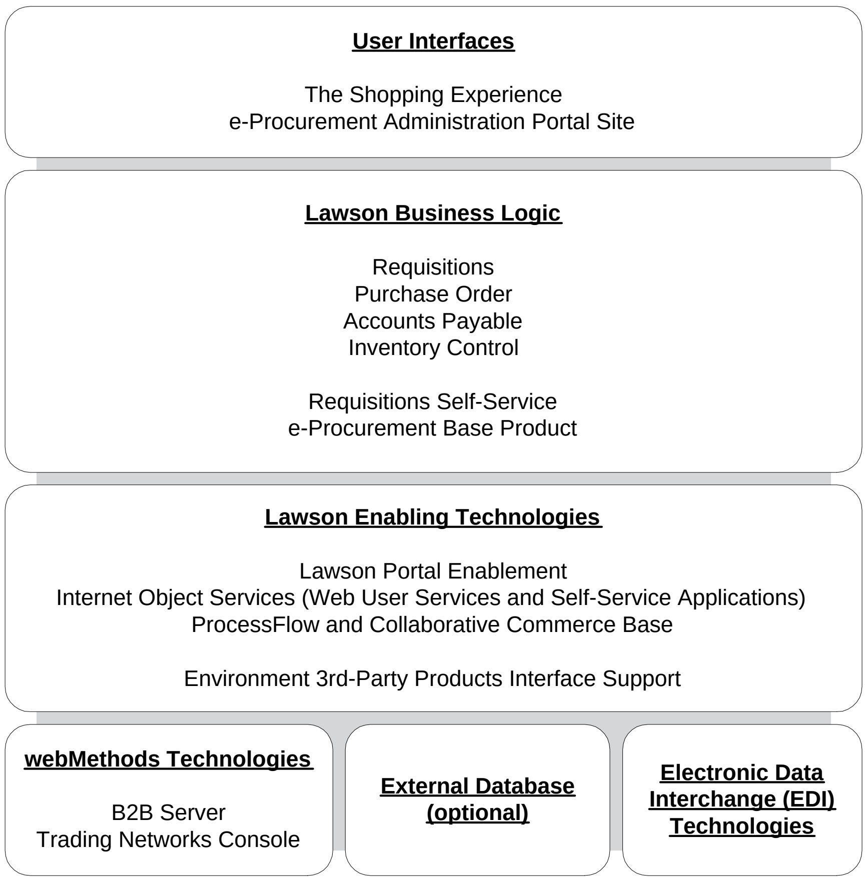
Requisitions Self-Service access for use with e-Procurement is based on Web User Profiles. The e-Procurement Portal also uses IOS to create bookmarks. For more information, see the Lawson Administration Guide.

- A database.

  The database stores e-Procurement data from webMethods. For more information, see the documentation provided by webMethods, and optionally a third party vendor if an external database is used.

The following diagram illustrates the e-Procurement components within the Lawson system and related 3rd-party products.

Figure 1. e-Procurement Components



How Do e-Procurement Components Work Together?

Punchout allows requesters to access external vendors websites, shop for items, and return selections to a Lawson Requisition. Punchout is a vendor managed catalog where items and prices are determined by your trading partner relationship. Each Punchout vendor's shopping experience is unique.

After e-Procurement has been set up, users of Requisitions Self-Service (RSS) who click a Shopping icon will cause the shopping website of a supported vendor to be displayed and a Lawson requisition to be created. The user can then buy items at the web site.

When the user is done shopping at the vendor site, e-Procurement returns the user to RSS. The user can save their requisition as a draft or do checkout, which causes the requisition to be released.

Orders may also be sent using e-Procurement if the vendor belongs to the Order Management Partners. These orders are not created from Punchout or RSS.

Purchase orders can be transmitted to the vendor after the PO is released. Lawson's EDI product is one method of transmitting data electronically. For more information, see the *EDI Standard User Guide* or the *EDI Professional User Guide*The Punchout tab on PO Vendor Maintenance (PO10.1) and Vendor Purchase From Location (PO10.2) allows you to specify whether or not to allow changes to Punchout items. For more information on setting up PO Vendors for EDI transmission of purchase orders, see the *Purchase Order User Guide*.

The webMethods Server transmits purchase orders.

ProcessFlow submits a requisition for approval through the Lawson system, as defined by the customer's setup. Two flows (**reqapproval1.flo** and **reqapproval2.flo**) route requisition approval requests to approvers. For more information on the role of ProcessFlow in Requisitions Self-Service, see "What is ProcessFlow?", in Appendix A of the Requisitions Self-Service User Guide. Alternatively, purchase orders can be approved manually.

What Is webMethods?

webMethods is a third-party software company providing products that facilitate communication between businesses. e-Procurement uses four webMethods components: two server pieces (Integration Server and Trading Networks server) and two client pieces (webMethods Developer and Trading Networks Console). Trading Networks server is an add-on to the Integration Server, and after installation becomes tightly integrated with the Integration Server. They are collectively referred to as the webMethods Server in this documentation, unless stated otherwise.

webMethods enables different computer systems to pass information back and forth in a manner in which each system can recognize and store the information being received. webMethods uses document type definitions, attributes, and processing rules to control the business transaction format and processing. webMethods transmits business documents using a variety of common Internet protocols, for example, HTTP, FTP, or SMTP.

In terms of e-Procurement, the Lawson customer receives information about items selected for purchase and their cost. The vendor receives purchase order information from the Lawson customer (by either EDI, webMethods, or fax). webMethods passes this information to the Lawson customer in the form of XML documents that are created from the time when the customer invokes a call to the vendor. The format and the way in which Purchase Order information is returned to the vendor depends on the type of document the vendor can accept.

When a Lawson user clicks the Punchout icon on the Requisitions Self-Service home page and then chooses a vendor, webMethods authenticates the user.

What Is the webMethods Developer?

NOTE During post-installation of e-Procurement, on the webMethodsDeveloper you must verify that the value for Access Control List is equal to Anonymous for all the folders in the LawEPS and LawPO packages.

The webMethods Developer is a component of the webMethods suite that must be installed in order to use the Trading Networks Console.

What Is the Trading Networks Console?

The Trading Networks Console is a webMethods product that is installed on the webMethods administrator's PC. The Trading Networks Console is used to track the documents that are passed between the customer and the vendor. The Trading Networks Console contains vendor profiles and the document attributes, document types, and processing rules that are used to put data into a format that is readable by other computer systems. The Console also reads the data stored in the database on the webMethods Server.

What is the Web Manager Window?

The Web Manager window allows webMethods administrators to access Trading Networks Console data via the Lawson Portal for tracking or troubleshooting purposes. This window allows the administrator to monitor and troubleshoot documents transmission between the customer and the vendor. The Web Manager Window can be used by the administrator to troubleshoot errors that may have occurred during the Punchout session, such as connection problems, or to check on the status of requests, such as whether a vendor confirmed the receipt of a purchase order.

The Web Manager Window also provides access to webMethods configuration tasks, such as activating custom pages or configuring Web Manager for partners.

What Are the e-Procurement Concepts I Need to Understand?

What Is Punchout?

Punchout refers to the selection of items for purchase on a vendor's web site. When a user clicks the Punchout task on the Requisitions Self Service home page and then selects a vendor, a dynamic HTTP link is established between the customer and the vendor. The user can then select items to order from the vendor's online catalog and add them to a Lawson requisition after checking out from the vendor's web site.

What is Order Management?

Order Management refers to the handling of Purchase Orders, Purchase Order Acknowledgement, Advance Ship Notice, and Invoices using webMethods but not Punchout or RSS.

What Are Users and User Groups?

webMethods utilizes defined users and user groups to authenticate clients and determine the server resources that a client is allowed to access. A user contains the user name, password, and group membership. A group contains the group name and a list of users in the group.

Lawson e-Procurement users are set up as valid requestors on the Requester Maintenance (RQ04.1) form and the User Personal Profile and Web Name (RD30) form.

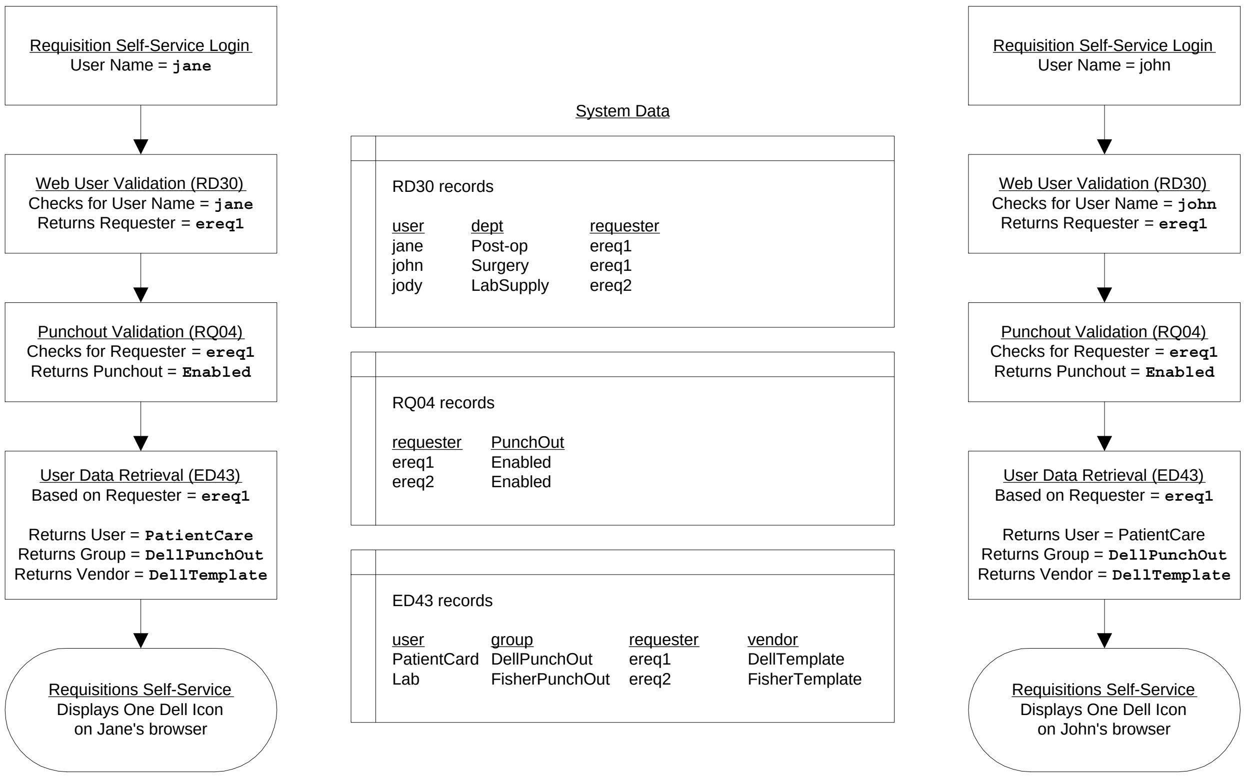
Lawson delivers two types of groups: Punchout and Purchase Order (PO). You will add users to the Punchout groups to enable their access to the vendor through Requisitions Self Service. The Purchase Order groups are used to configure a different URL or delivery protocol for transmitting the purchase order to the vendor. The group names are preconfigured in the Trading Networks Console.

How Are Lawson and webMethods Users and Groups Related?

Since e-Procurement is an Internet solution, a Lawson Web User record must exist for each Requisitions Self-Service (RSS) user. After the user logs in to RSS, they are validated against the User Personal Profile and Web Name (RD30) record and the requester associated with that user. If Punchout is enabled for that requester on Requester Maintenance (RQ04.1), e-Procurement looks up the Group and Vendor information stored onB2B

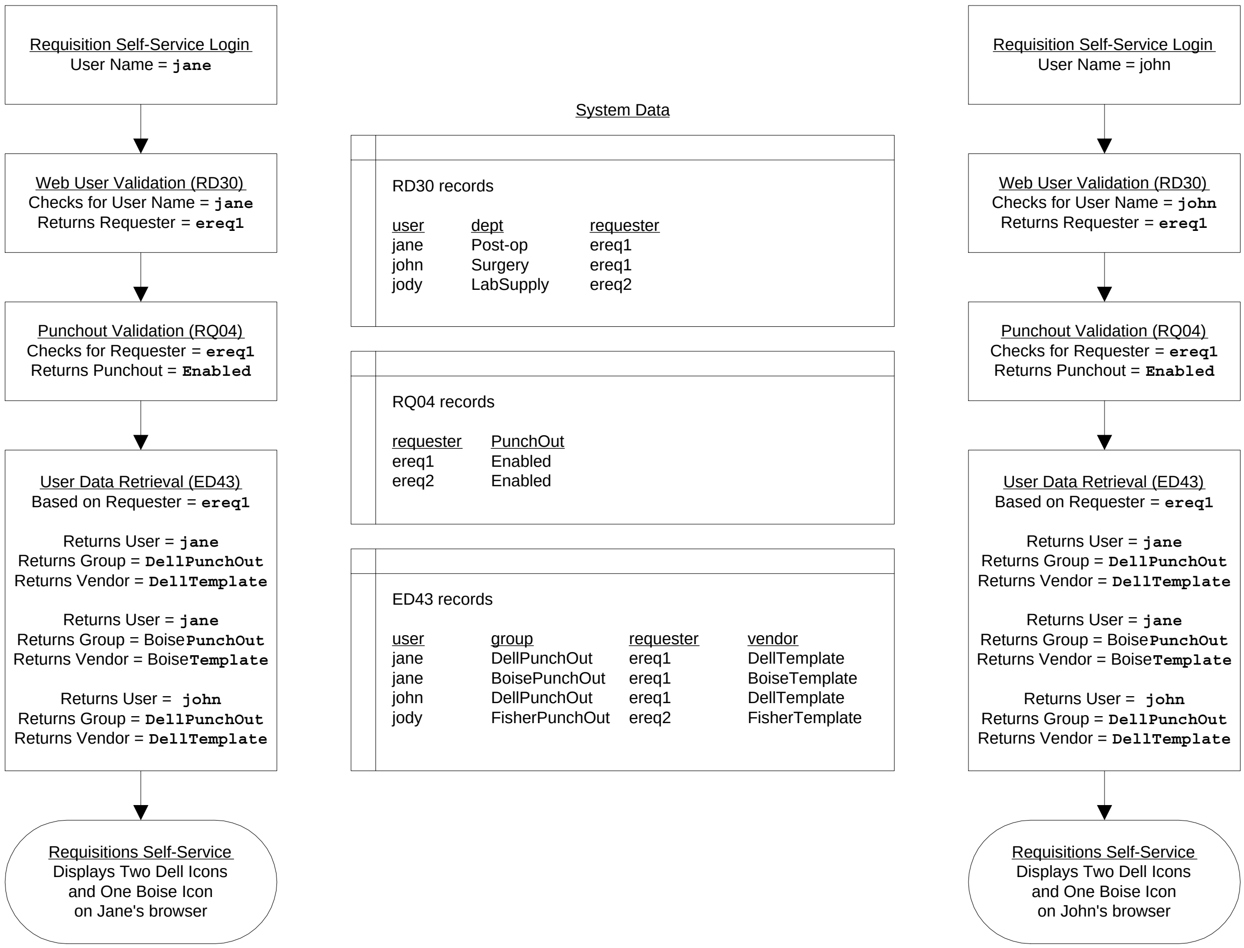
Users (ED43). The appropriate Punchout icon is displayed on the RSS portal page for that user.

Figure 2. Lawson and webMethods User and Group Data Relationships



In the example shown in this figure, each Lawson web user is assigned to only one Requester Maintenance (RQ04.1) requester and one B2B Users (ED43) group. A requester can have multiple users, and a group can have multiple requesters. Lawson recommends that you follow these guidelines to avoid a situation like that shown in the following figure, which results in multiple vendor icons displaying in RSS for one user.

Figure 3. Multiple Groups Related to One Lawson Requester



What Is a Vendor?

A vendor is who you purchase items from. Vendors are specified in the Lawson applications system, in the e-Procurement Portal, and in webMethods.

What Are Vendor Profiles and Vendor Templates?

Vendor Profiles and Vendor Templates are delivered by Lawson for use with e-Procurement.

Vendor Profiles

A vendor profile is a document that contains information about a vendor, such as the corporation name, contact information and how to connect to the vendor. The vendor profile is configured so that a Lawson customer and the vendor can communicate using the webMethods Server.

The vendor profile contains the customer username and password (both supplied by the vendor) for the vendor web site. The Lawson customer enters the customer username and password into the Corporate Tab of the vendor profile on the Trading Networks Console. If this (along with other setup) has been done, users who access the vendor web site can be automatically authenticated.

webMethods users are assigned to a vendor (group) on the webMethods Server. Each vendor on the webMethods Server has a corresponding Vendor Profile on the Trading Networks Console that contains the vendor username and password that is used by all the users for a given Lawson customer.

Delivered Vendor Profiles

The vendor profile is delivered by Lawson and imported into the Trading Networks Console on the administrator's PC. The Lawson customer uses the Trading Networks Console to import the vendor profiles into their Trading Networks Console.

Lawson can deliver two different types of vendor profiles: the Healthcare Connector (HC), and the Maintenance, Repair, and Operations (MRO) Connector.

Vendor profiles are documented in the e-Procurement Trading Partners List document, available from support.lawson.com.

webMethods Trading Networks Vendors

Vendors are specified on the Trading Networks Console Extended Fields tab. There are two types of fields:

- Fields defined by webMethods.
- Fields defined by the customer.

On the webMethods Vendor Profile Corporate tab, the customer enters the username and password.

The Trading Networks administrator specifies the environment type (test or production) on the vendor profile Extended Fields tab.

Vendor Templates

A vendor template is the record in the ED system code for a vendor web site available for Punchout. A vendor template is defined on B2B Template (ED45). Entries on the B2B Users (ED43) and B2B User Groups (ED41) forms link the user and group information that is entered on the Integration Server with the vendor information entered on Vendor Maintenance (AP10.1) and the Requester information entered on User Personal Profile and Web Name (RD30).

How Are Documents Transmitted to the Vendor?

After an e-Procurement Purchase Order is created, Mass PO Issue (PO120) moves it into a file called filename**.po** in the SweepDir directory specified in Mass PO Issue (PO120) or on the Requisitions Settings page of the e-Procurement portal. This file contains multiple purchase orders in a POLIST. The sweep program uses the vendor group and vendor number from this list to find the Attribute ID and the User Group name attached to this purchase order. If there is a vendor with the same service name, the sweep program sends the purchase order to that vendor.

What Is Integration Server Package Management?

A package is a container that is used to bundle services and related elements from Lawson that configure the Integration Server for e-Procurement. Packages are designed to hold all of the components of a logical unit in a B2B solution. For example, you might group all of the services and files specific to a particular B2B marketplace in a single package.

Lawson delivers six packages to be used by the Web Methods Server to allow the customer to communicate with the vendor. These packages are

- LawPO.zip
- WmEDI.zip
- WMcXML.zip
- LawEps.zip
- LawEmail.zip
- EDIEprocInterface.zip

These packages contain documents that tell the server how to handle specific events when passing information back and forth between the customer and vendor. For example, LawPO.zip contains system information about sending a purchase order as an XML document after a purchase order is created in Lawson from a requisition.

You import packages to webMethods server immediately after the B2B and Trading Networks web server are installed and configured.

What Are Document Types, Attributes, and Processing Rules?

Document types are definitions of different types of documents that you expect to pass through your trading network as you interact with a vendor through the e-Procurement product. The document types instruct Trading Networks how to recognize specific types of documents.

Document attributes are definitions that identify specific pieces of information that you want Trading Networks to extract from documents, for example, the sender of the document or the total amount of a purchase order.

Processing rules are definitions that specify the actions that you want Trading Networks to perform for the document. For example, you might specify that you want Trading Networks to deliver the document to a vendor or invoke a B2B service to process the document.

Lawson information about document types, document attributes, and processing rules is imported to the Trading Networks Console as wMTNExport files.

Chapter 3

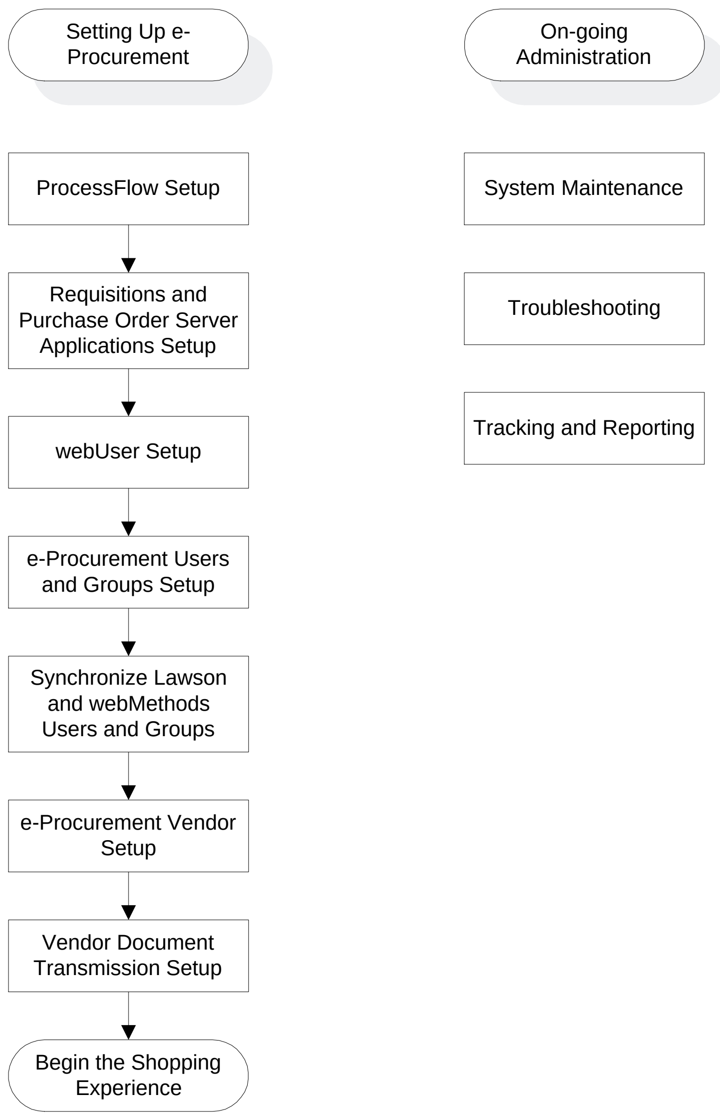
Setting Up e-Procurement

Concepts in this Chapter

What Are e-Procurement Administration Tasks?

The e-Procurement Administrator performs a variety of tasks to set up, maintain, and troubleshoot users and vendors for the Shopping Experience. The following figure shows the flow of administrative tasks that enable set up, maintenance, troubleshooting, and reporting for e-Procurement.

Figure 4. e-Procurement Administrative Tasks



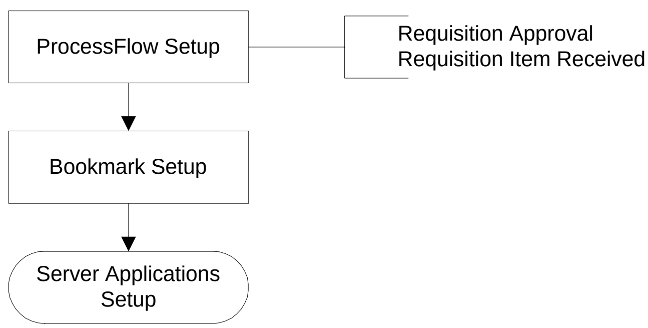
Each of these tasks is explained further in the following sections:

- "What Are the ProcessFlow Setup Tasks for e-Procurement?" on page 29

What Are the ProcessFlow Setup Tasks for e-Procurement?

The e-Procurement Administrator must setup ProcessFlow for Requisitions. The following figure shows the flow of administrative tasks for ProcessFlow for e-Procurement.

Figure 5. ProcessFlow Setup



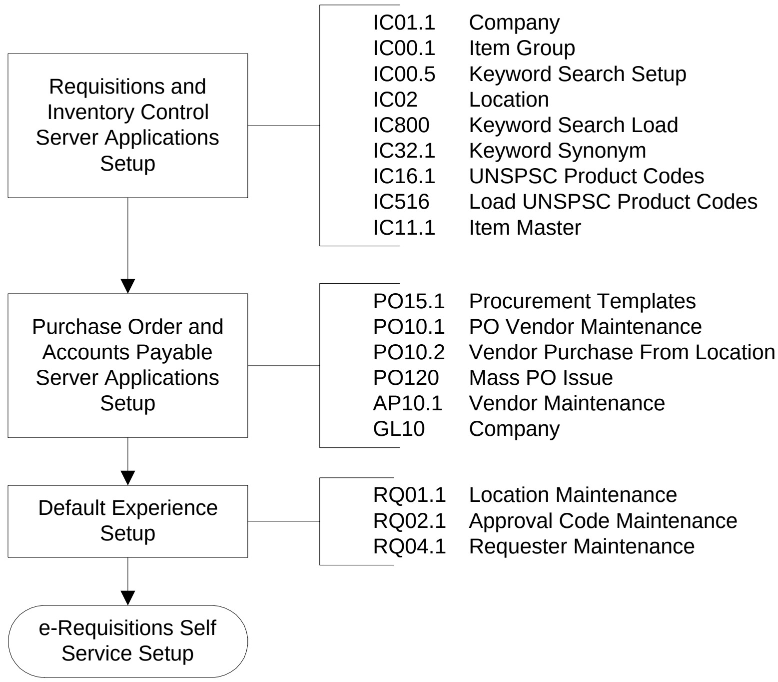
Each of these tasks is explained further in the following documentation:

- ProcessFlow setup is documented in the ProcessFlow Administration Guide.
- Bookmark setup is documented in the Lawson Administration User Guide

What Are the Server Application Setup Tasks for e-Procurement?

The e-Procurement Administrator must consider the setup of several server applications: Requisitions, Inventory Control, and Purchase Order.

Figure 6. Server Application Setup Tasks



See the following manuals for more information setting up Lawson server applications:

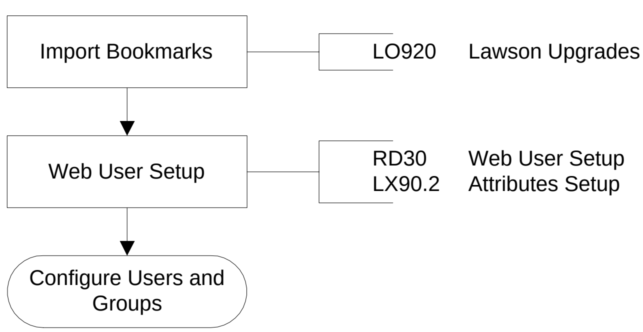
- Requisitions setup is documented in the Requisitions User Guide and the Inventory Control User Guide.
- Purchase Order setup is documented in the Purchase Order User Guide.
- Default Experience setup is documented in the Requisitions User Guide and the Requisitions Self-Service User Guide.

What Are the Portal Setup Tasks for e-Procurement?

The e-Procurement Administrator must import e-Procurement bookmarks and set up Lawson Web Users for e-Procurement access.

NOTE Each Web User record as specified in User Personal Profile and Web Name (RD30) should have a unique and valid value in the Requester field.

Figure 7. Web User Setup Tasks



e-Procurement portal set up is described in .

For more information on setting up web users in Lawson and configuring Internet Object Services, see the following documents:

- Lawson Administration User Guide
- Internet Object Services Installation Guide

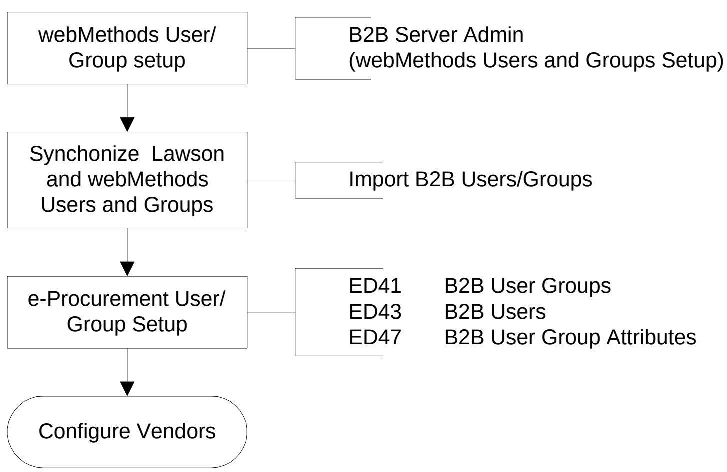
For more information on setting up users in webMethods, see the following documents:

- webMethods for Trading Networks Installation and Upgrade Guide
- Integration Server Administrator’s Guide

What Are the User and User Group Setup Tasks for e-Procurement?

The e-Procurement Administrator must setup e-Procurement Users and User Groups. The following figure shows the flow of tasks to set up Users and User Groups for e-Procurement.

Figure 8. e-Procurement Users and User Groups Setup Tasks



These tasks are explained further in the following sections:

- "Setting Up Groups and Users on the Integration Server" on page 35
- "Synchronizing Lawson and webMethods Users and Groups" on page 36

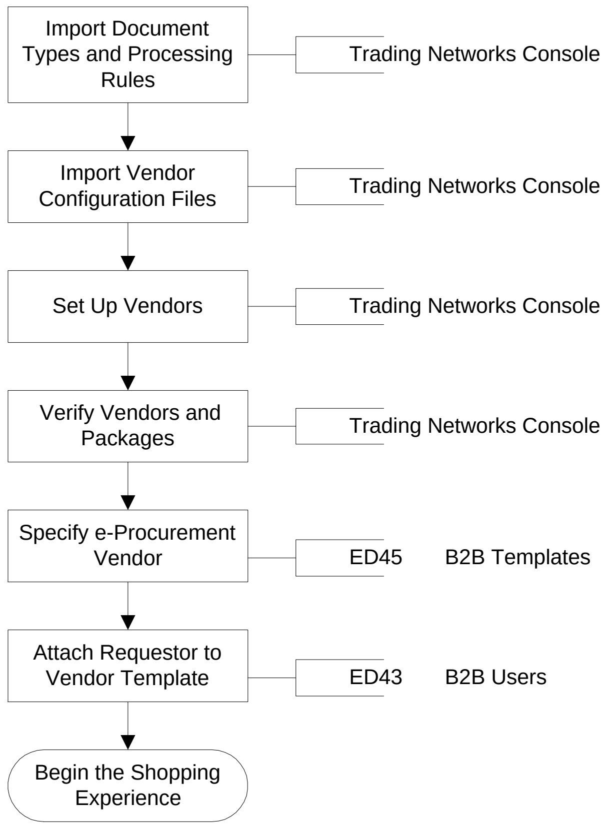
For more information on setting up users in webMethods, see the following documents:

- webMethods for Trading Networks Installation and Upgrade Guide
- Integration Server Administrator’s Guide

What Are the Vendor Setup Tasks for e-Procurement?

After setting up Lawson vendors in Vendor Maintenance (AP10.1) and PO Vendor Maintenance (PO10.1), the e-Procurement Administrator must set up e-Procurement vendors. This process specifies which vendors a user can purchase from. The flow of tasks to setup vendors for e-Procurement is shown in the following figure.

Figure 9. e-Procurement Vendor Setup Tasks



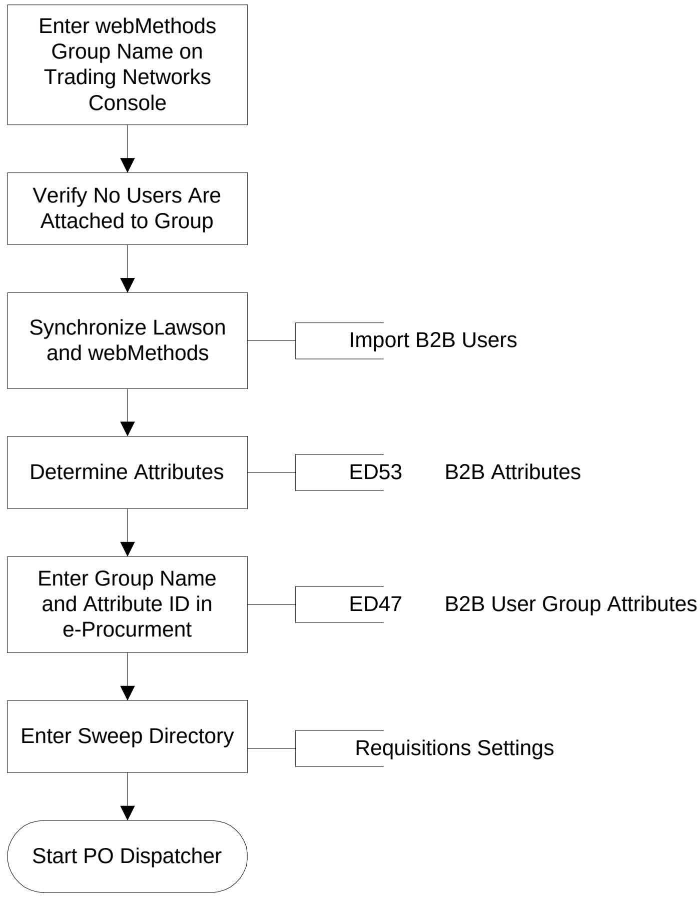
The customer sets up Vendor Profiles by creating a group for the vendor in the Integration Server. Importing B2B Groups creates the vendor Group name on the B2B User Groups (ED41) page. The Template Name for a vendor is specified on B2B Template (ED45). The Requester is attached to the vendor on B2B Users (ED43).

These tasks are described in the *e-Procurement Trading Partner List*.

What Are the Vendor Document Transmission Setup Tasks?

After an e-Procurement Purchase Order is created, Mass PO Issue (PO120) moves it into a file called `filename.po` in the SweepDir directory specified in PO120 or on the B2B Settings page of the e-Procurement portal. This file contains multiple purchase orders in a POLIST. A sweep program, PO Dispatcher, uses the vendor group and vendor number from this list to find the Attribute ID and the User Group Name attached to this purchase order. If there is a vendor with the same service name, PO Dispatcher sends the purchase order to that vendor.

Figure 10. Setting Up Vendor Transmission for Purchase Orders Using the Portal Interface



The B2B Attributes (ED53) form is used to enter an Attribute Name (which is always the Lawson Vendor) and an Attribute Value (which is comprised of the vendor group and Lawson vendor number, joined by a hyphen). The User Group ID from the B2B User Groups (ED41) form is then entered on the B2B User Group Attributes (ED47) form.

These tasks are described in "What Are the Vendor Document Transmission Setup Tasks?" on page 32.

What Are the Web Manager Setup Tasks?

The e-Procurement Administrator can use the Web Manager feature of webMethods to monitor and analyze (troubleshoot) e-Procurement activity.

webMethods tracks the audit trail logging information that passes back and forth between the customer and the vendor. The audit trail information records the way a transaction is responded to and handled by the software, rather than the details of a specific transaction. The webMethods Server stores this information in the database. The Trading Networks Console is used to view the contents of the database.

These tasks are explained further in the following sections:

- "Importing Document Types and Processing Rules" on page 43

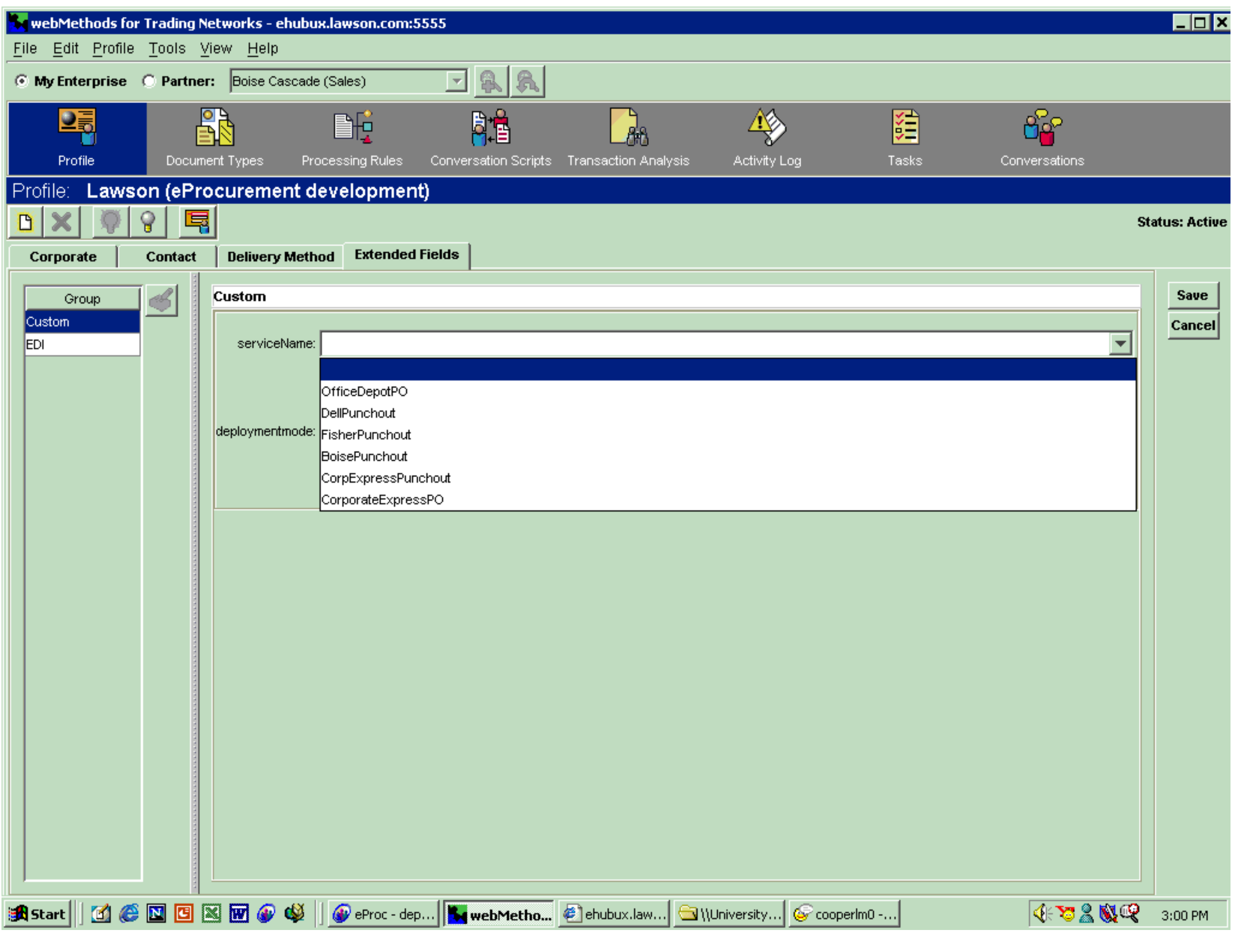
Procedures in this Chapter

Setting Up Groups and Users on the Integration Server

This procedure enters the names of users and user groups into the webMethods Integration Server.

To perform this procedure you must use the serviceName delivered with the Lawson-supplied vendor profiles for the Group name for each vendor. The serviceName appears in the Trading Networks Vendor Profile Extended field. Use the drop-down list to view the preconfigured Group names.

Figure 11. The Trading Networks Vendor Profile Screen Displaying the serviceName (Group names) Pull-Down List.



For more information on delivered Group names, see the e-Procurement and Order Management Trading Partners List. For more information on vendor groups, see "Importing Vendor Configuration Files with the Trading Networks Console" on page 42.

STEPS

To set up Users and User Groups

NOTE You can use the default values of **Administrator** (user name) and **manage** (password).

1. On the e-Procurement portal interface, click on the B2B Admin link.
2. Enter a user name and password which has administrative privileges on the Integration Server.
   The B2B Admin interface is opened.
3. On the Integration Server, select Security > Users and Groups.
4. Select Add and Remove Groups from the bullet list atop the Users and Groups screen.
5. In the Create Groups box, add a group for each Punchout or Purchase Order vendor. For example, create a group called OfficeDepotPunchout for the vendor Office Depot.
6. Select Add and Remove Users from the bullet list at the top of the Users and Groups screen. Users are not required for Purchase Order groups.
7. In the Create Users box, assign your punchout authorized users to the group (vendor).
   - Assign users to the Group (Punchout Vendor) they are authorized to use.
   - Do not attach users to Group names for PO vendors. Only attach users to Group names for Punchout vendors. See "What Are Users and User Groups?" on page 21 for more information on the different types of groups.
8. Ensure that the same users and groups appear in B2B User Groups (ED41).

Synchronizing Lawson and webMethods Users and Groups

After entering the users and groups as outlined in the procedures "Setting Up Groups and Users on the Integration Server" on page 35 and , synchronize the data shared by Lawson and webMethods.

STEPS

To synchronize Lawson and webMethods Users and Groups

- On the e-Procurement portal, select Import B2B Users/Groups.

  The following message appears:

  `Lawson ED data synchronized to webMethods`

Starting and Stopping PO Dispatcher

Perform these procedures to start or stop e-Procurement transmission of XML documents to vendors.

STEPS

To start PO Dispatcher

- On the e-Procurement portal interface, select Start PO Dispatcher.

  The following message appears:

  Sweeper is configured for: Remote and is currently

Running

STEPS To stop PO Dispatcher

- On the e-Procurement portal interface, select Stop PO Dispatcher.

  The following message appears:

  Sweeper is configured for: Remote and is currently

  Not Running

Chapter 4

Maintaining e-Procurement

Concepts in this Chapter

System Maintenance

The e-Procurement product requires certain maintenance tasks be performed. Some processes, such as system backups or patch installation, must be created by the customer. Others, such as installing additional e-Procurement packages from Lawson, are described in this manual.

The tasks requiring use of Lawson-delivered e-Procurement components or settings are explained further in the following sections:

- "System Maintenance" on page 40
- "Web Manager" on page 40
- "What Are the Troubleshooting Tasks for e-Procurement?" on page 41

For more information on using the general administration tasks related to Lawson products, see the following document:

- Lawson Administration User Guide
- MicroSoft SQL Server 2000 Setup and Tools Guide

Web Manager

e-Procurement information can be tracked using the Trading Networks Console.

The Trading Networks Console has a tracking page where you can see what cXML and EDI documents have been sent back and forth between the customer and the vendor. The console can also be used to check on the status of various requests, such as the status of purchase order requests (for instance, whether Dell confirmed the receipt of a purchase order).

NOTE RSS uses the web user/ID value entered on User Personal Profile and Web Name (RD30) to authenticate users, but it tracks requisitions themselves using the Requester field that was also entered on User Personal Profile and Web Name (RD30). (That is, the vendor does not care who individual users, or shoppers are, but Lawson applications do.)

webMethods tracks the audit trail logging information (not details of a transaction itself but the way a transaction is responded to and handled by the software) that passes back and forth between the customer and the vendor. The webMethods Server stores this information in the database; the Trading Networks Console allows us to view the contents of the database.

For more information on vendor support with e-Procurement, see the e-Procurement Trading Partners List.

For more information on using the Trading Networks Console, see the following documents:

- webMethods for Trading Networks Installation and Upgrade Guide
- Integration Server Administrator’s Guide
- Trading Networks Guide

What Are the Troubleshooting Tasks for e-Procurement?

The e-Procurement Administrator can use the webMethods log files to troubleshoot the system.

Troubleshooting tasks are explained further in:

- "Using Log Files" on page 42
- "Verifying Vendors and Packages on the Trading Networks Console" on page 44

Procedures in this Chapter

Maintenance and Troubleshooting Procedures

The following procedures are documented in this section:

Using Log Files

For troubleshooting help, a log of errors is stored in the e-Procurement log files.

STEPS

To review log files

- On the e-Procurement portal, select B2B Log Files.

  A list of log files appears.

Select:	To review:
View the Admin Log	Administrative messages.
View the Error Log	Error messages, including the date and time stamp.
View the Full e-Procurement Service Log	Informational messages about system activity, such as starting and stopping PO Dispatch, or when files are sent to vendors.
View the Transaction Log	Information about transactions processed by the system.

Importing Vendor Configuration Files with the Trading Networks Console

Vendor configurations are delivered by Lawson and imported into the Trading Networks system. The vendor configuration information is stored in the database.

IMPORTANT If you reinstall a vendor that has previously been set up, you will lose all setup information, such as the DUNS number, user name, and password. Normally vendor configuration files are imported at installation time. When upgrading from a previous release or installing additional vendors, be sure to check your setup for installed vendors before you begin this procedure.

STEPS

To import vendor configuration files

1. On the Trading Networks Console, choose File > Import.
2. Import either all the vendors or just the vendor(s) your enterprise is using, one at a time.
   - Use the single arrow to import the vendors one at a time.
   - Use the double arrows to import all the vendors one at once.

   When a vendor is imported, it will show up linked to the enterprise profile in the Trading Networks Overview window.

Importing Document Types and Processing Rules

Use this procedure to import document types and processing rules for each vendor.

STEPS

To import document types and processing rules for each vendor

IMPORTANT Do not reinstall existing document types or processing rules; only add them for new vendors that were not a part of your previous installation. If you reinstall you will overwrite existing setup data.

1. On the Trading Networks Console, choose File > Import.

   An Import Data window appears.
2. Click the Select File icon on the Import Data window.
3. Select the **wMTNExports.xml** file and click Open.

   The Document Types and Processing Rules appear on the left side of the Import Data window under AVAILABLE ITEMS.
4. Use the blue are icon that points to the right to import Document Types and Processing Rules.
   - Use the single arrow to import the vendors one at a time.
   - Use the double arrows to import all the vendors one at once.

   When a vendor is imported, it will show up linked to the company profile on the Trading Networks Overview screen.
5. Click the Processing Rules icon at the top of the window.

6. Verify that Default Rule is at the bottom of the list of Processing Rules. If it is not, move it to the bottom by selecting Default Rule and clicking the blue underlined down arrow icon.

Verifying Vendors and Packages on the Trading Networks Console

This procedure assumes that you have already imported a preconfigured file for each vendor, as described in "Importing Vendor Configuration Files with the Trading Networks Console" on page 42. This procedure describes the how to verify that the files were imported.

STEPS

To verify vendors and packages on the Trading Networks Console

1. On the Trading Networks Console, choose Document Types from the View menu.
2. Verify that the document types are shown.
3. From the View menu, choose Processing Rules.
4. Verify that the processing rules are shown.
5. Verify that the Processing Rules are enabled.

Appendix A

webMethods Default Values

webMethods Default Values for Users and User Groups

User	Groups	Description
Administrator	Administrators Replicators Everybody	A user account that has administrator privileges. You can use the Administrator user account to access the Server Administrator to configure and manage the server.
Default	Anonymous	Used when a user does not supply a user name and password.
Developer	Developers	A user that can connect to the server from the webMethods Developer to create, modify and delete services that reside on the server.
Replicator	Replicators	The servers uses this account during package replication.

Group Name	Members	Description
Administrator	Administrators	This group identifies users that have administrator privileges. A user must have administrator privileges to configure and manage the server.
Anonymous	Default	This group identifies users that have not been authenticated.
Developers	Developer	Identifies users that have developer privileges. A user must have developer privileges to connect to the server from the webMethods Developer.
Everybody	Administrator Default Developer Replicator	All users are a member of this group. Every new user is automatically added to the Everybody group.
Replicator	Administrator Replicator	Identifies users that have replicator privileges. This group gives its members the authority to perform pack replication.

Appendix B

Reviewing User and Group Data

Reviewing User and Group Data

This appendix describes how to use the e-Procurement portal page User Group Inquiry to review information about Users and Groups.

STEPS

To view user and group data

1. On the e-Procurement portal, select B2B Users by Group.

   The User Group Inquiry page appears.

2. Enter a User Group in the UserGrp field and press Inquire, or press use the buttons at the top of the page to navigate through groups.

   If users are assigned to a group, data will appear on the page. Consider the following fields:

Field	Description
UserGrp ID	Display only. The Attribute ID for the e-Procurement User Group shown in the UserGrp field. See "What Are the Vendor Document Transmission Setup Tasks?" on page 32 for more information on the Attribute ID.
User ID	Display only. The User ID specified on B2B Users (ED43) is shown for each user assigned to the e-Procurement User Group shown in the UserGrp field. See for more information on the User ID.
Uname	Display only. The User Name specified on B2B Users (ED43) is shown for each user assigned to the e-Procurement User Group shown in the UserGrp field. See for more information on User Names.
Requester	Display only. The Requester specified on B2B Users (ED43) and Requester Maintenance (RQ04.1) is shown for each user assigned to the e-Procurement User Group shown in the UserGrp field. See for more information on Requesters.
TempId	Display only. The Template ID specified on B2B Template (ED45) is shown for each user assigned to the e-Procurement User Group shown in the UserGrp field. See "What Are Vendor Profiles and Vendor Templates?" on page 23 and "What Are the Vendor Document Transmission Setup Tasks?" on page 32 for more information on the Vendor Template ID.
TempN	Display only. The Template Name specified on B2B Template (ED45) is shown for each user assigned to the e-Procurement User Group shown in the UserGrp field. See "What Are Vendor Profiles and Vendor Templates?" on page 23 and "What Are the Vendor Document Transmission Setup Tasks?" on page 32 for more information on the Vendor Template Name.
Client	Display only. The Client specified on B2B Template (ED45) is shown for each user assigned to the e-Procurement User Group shown in the UserGrp field.
PrdIn	Display only. The Product Line specified on B2B Template (ED45) is shown for each user assigned to the e-Procurement User Group shown in the UserGrp field.

Field	Description
Vendor	Display only. The Vendor specified on B2B Template (ED45) is shown for each user assigned to the e-Procurement User Group shown in the UserGrp field.
Loc	Display only. The Purchase From Location specified on B2B Template (ED45) is shown for each user assigned to the e-Procurement User Group shown in the UserGrp field.

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