covisint
a subsidiary of Compuware Corporation

Connect Activation and Tracking System (CATS)

Administrator's Guide

August 2004
Product Revision Level 1.0.0

INTRODUCTION

About this Course

The purpose of this guide is to create and manage Trading Partners, relationships, EDI Profiles, and reports for the General Motors supplier database. This is a self-paced workbook comprised of concepts, screen shots, and correlating work steps.

Course Objectives

At the end of this course, participants are able to:

- Define CATS Overview and User Roles
- Create and Manage Trading Partners
- Create and Manage Relationships
- Create and Manage EDI Profiles
- Generate Reports
- Perform Administrative Tasks

Target Audience

The target audience includes:

- Administrator
- Super Administrator (Covisint)

Prerequisites

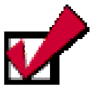
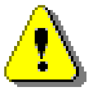
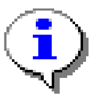
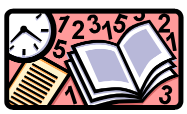
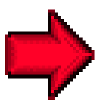
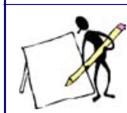
- Obtained a Covisint User ID and Password
- Working knowledge of GM Data feed for Supplier Relationships

Training Duration

- Total training time - 2 hours

Icons

The following icons are used throughout the guide. Each icon represents a specific learning point for quick reference.

ICON	DESCRIPTION
	Signifies beginning of new module (chapter)
	Important information regarding a topic
	Definition of a new term the first time it is used
	Additional information about the topic
	Summary or topic review of key concepts
	Transition to indicate the end of a module.
	A page where you can write your own notes/comments

System Requirements

The recommended system requirements for Covisint Connect include:

- Microsoft Internet Explorer 5.0

MODULE 1: CATS OVERVIEW

Overview

CATS application is a data repository of GM supplier's EDI information. This information includes company name and address, identification of plants to whom supplier ships parts, the EDI capability of the supplier, contact names and phone numbers of the suppliers, and additional information about the supplier in the form of comments. This information is used to support the following processes:

- Cutover, Supplier Activation and Certification Processes
- Com Code/DUNS/Site Code Relationship Setup and Maintenance
- Supplier Contact Maintenance
- Customer Code Setup
- Fax Schedule and Fax Bulletin Process
- Supplier EDI Capability Reporting and Maintenance
- Analytical Ad-Hoc Reporting

Objectives

Upon completion of this module, participants are able to:

- Define CATS Overview and User Roles
- Log in to CATS
- Identify elements of the Home screen
- Performing searches

Introduction

Module 1 provides the CATS Administrator with a high-level overview of the Connect Activation and Tracking System environment, as well as the procedures for accessing the application.

Connect Activation and Tracking System (CATS)

CATS application is a data repository of GM supplier's EDI information. This information includes company name and address, identification of plants to whom supplier ships parts, the EDI capability of the supplier, contact names and phone numbers of the suppliers, and additional information about the supplier in the form of comments

This information is used to support the following processes:

- Cutover, Supplier Activation and Certification Processes
- Com Code/DUNS/Site Code Relationship Setup and Maintenance
- Supplier Contact Maintenance
- Customer Code Setup
- Fax Schedule and Fax Bulletin Process
- Supplier EDI Capability Reporting and Maintenance
- Analytical Ad-Hoc Reporting

User Roles and Privileges

Users of the CATS application must obtain one of the user roles available. These roles and associated privileges are defined as:

TASK	SUPER ADMINISTRATOR	ADMINISTRATOR	COVISINT HELP DESK	TRADING PARTNER BASIC
Create Administrator users	X	*	-	-
Create and send fax bulletins	X	X	-	-
Create Super Admin users	X	*	-	-
Edit Trading Partner information	X	X	X	-
Generate reports	X	X	X	X
Manage documents and messages	X	X	-	-
Manage EDI profiles	X	X	-	-
Manage lookup codes	X	X	-	-
Manage master data	X	X	-	-
Manage profile users	X	X	-	-
Manage queries	X	X	-	-
View Administration tables	X	X	X	X
View any Trading Partner information	X	X	X	X
View Trading Partner relationships	X	X	X	X

*Contact your Covisint representative when a Super Administrator role is necessary.

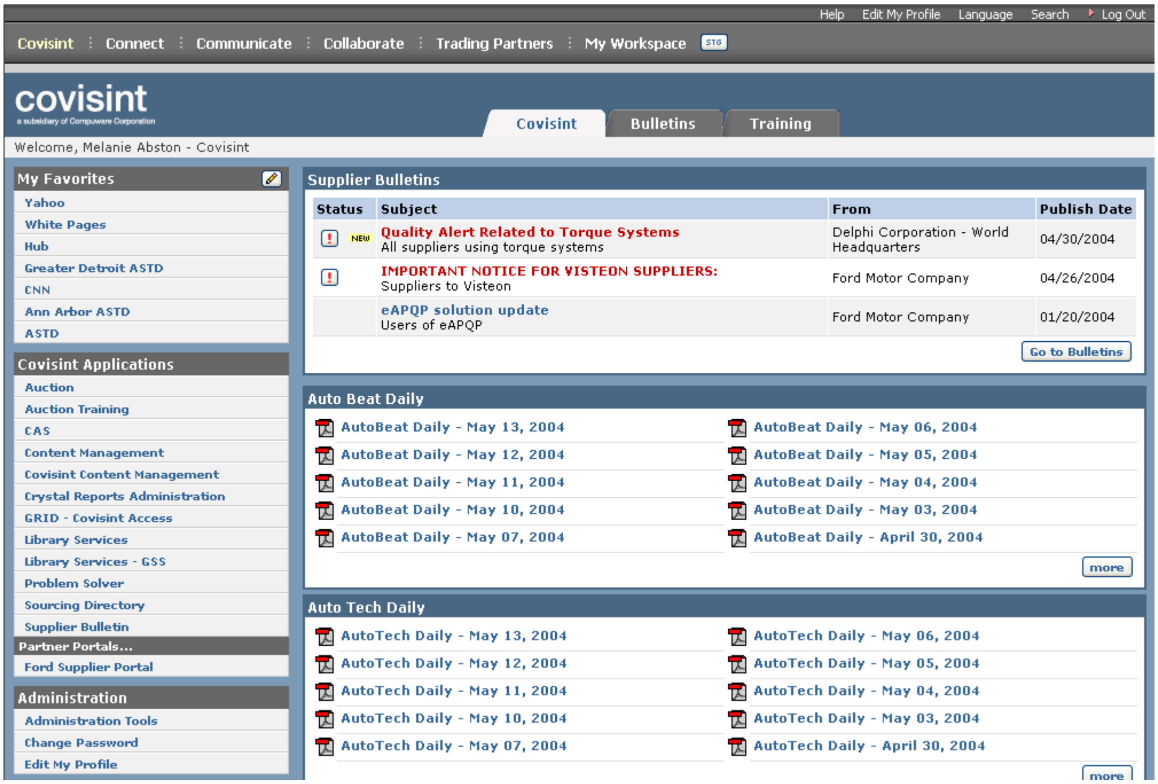
Accessing CATS

Complete the following steps to log in to Covisint Connect:

1 Key in www.covisint.com in your browser's address bar, then click Go or press [Enter] on your keyboard to launch the site.

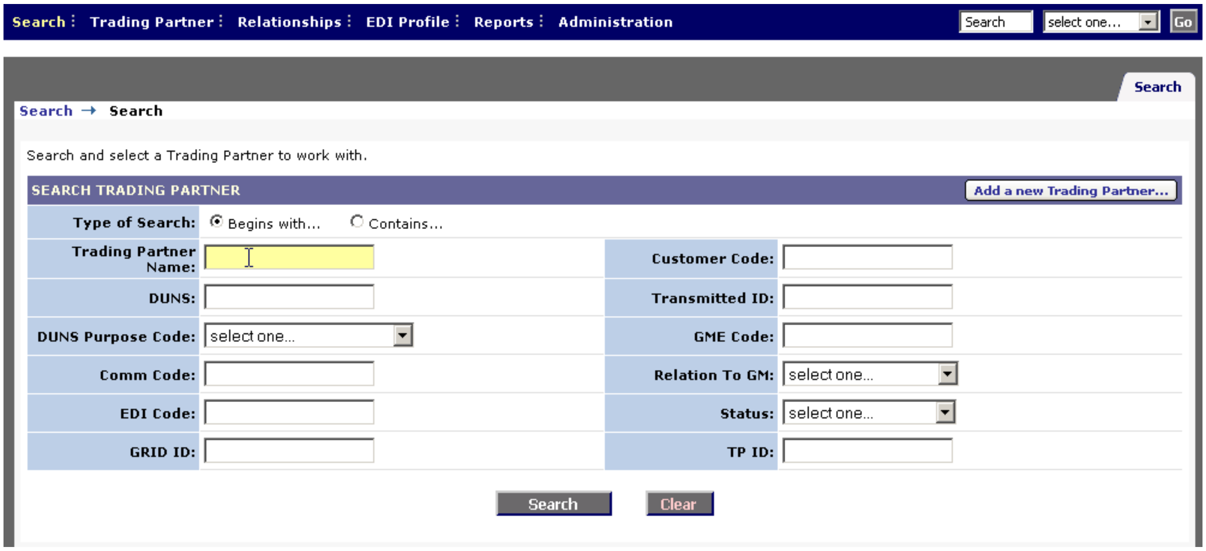
2 Key in your Covisint ***User ID*** and ***Password*** (in the upper right) and click or press **[Enter]** on your keyboard.

THE COVISINT **PORTAL HOME** PAGE DISPLAYS



3 Select **CATS** from the *Portal Home* page under **Covisint Applications** (in the left pane of the page).

THE CATS APPLICATION IS DISPLAYED.



RESULT

You have successfully logged in to the CATS application.

Elements of the CATS Home Screen

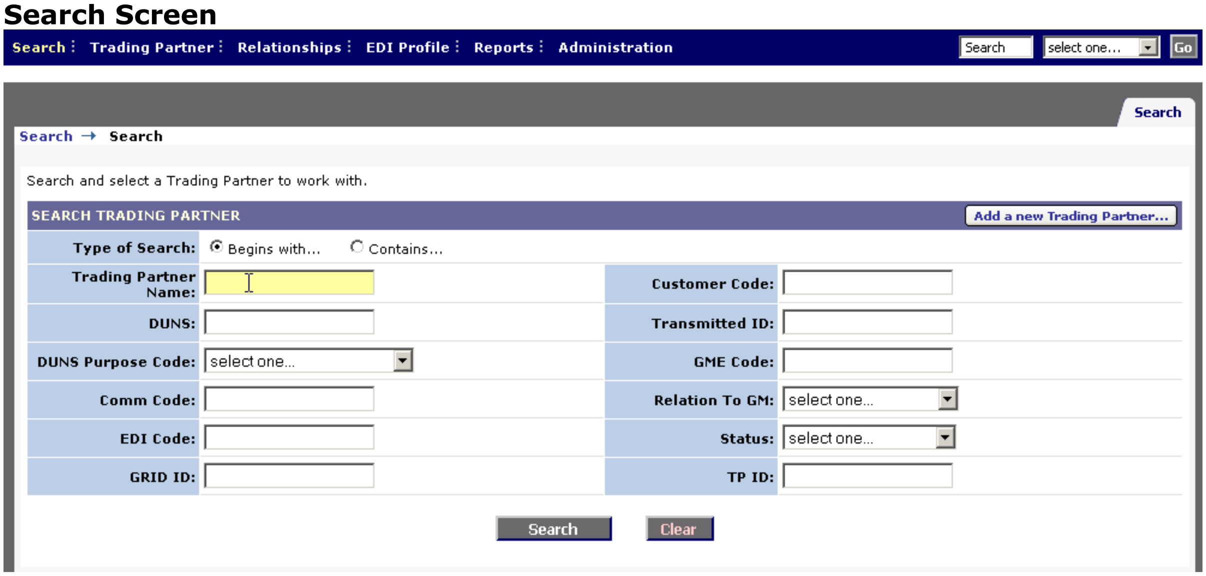
The CATS application is navigated via links and tabs. You will notice that columns within the application are 'clickable'. This allows a user to resort the page displayed based upon the selected column header. The following table describes the links and tabs available within the home screen of the application.

LINK / TAB	DESCRIPTION
Home	**Links the user back to this CATS home screen from anyplace in the application.**
Covisint Connect	**Links the user into the Covisint Connect application.**
Portal	**Links the user back to the main Covisint portal.**
Help	**Links the user to the online help available. Clicking this opens a new window in which the help information is displayed.**
Contact Us	**Links the user to points of contact including Covisint Customer Service, Website feedback.**
Logout	**Logs the user out of the current session of CATS.**
Search Tab	**You must first search and select the trading partner you wish to administer before performing additional functionality.**
Trading Partners Tab	**Administrators are able to view and manage trading partner relationships.**
Relationships Tab	**Administrators are able to view and manage existing Supplier relationships and Customer relationships.**
EDI Profile Tab	**Administrators are able to view and manage existing EDI Profiles, including: certification, connectivity, and service providers.**
Reports	Administrators are able to create, download, and print reports.
Administration	Administrators are able to manage administration tables, queries, lookup codes, and users.

Performing Searches

All functionality available within CATS is performed on a per-trading partner basis (excluding Reports and Administration tabs). Therefore, you must always search and select the trading partner you wish to administer before performing any of the functionality described in this workbook.

Search Screen

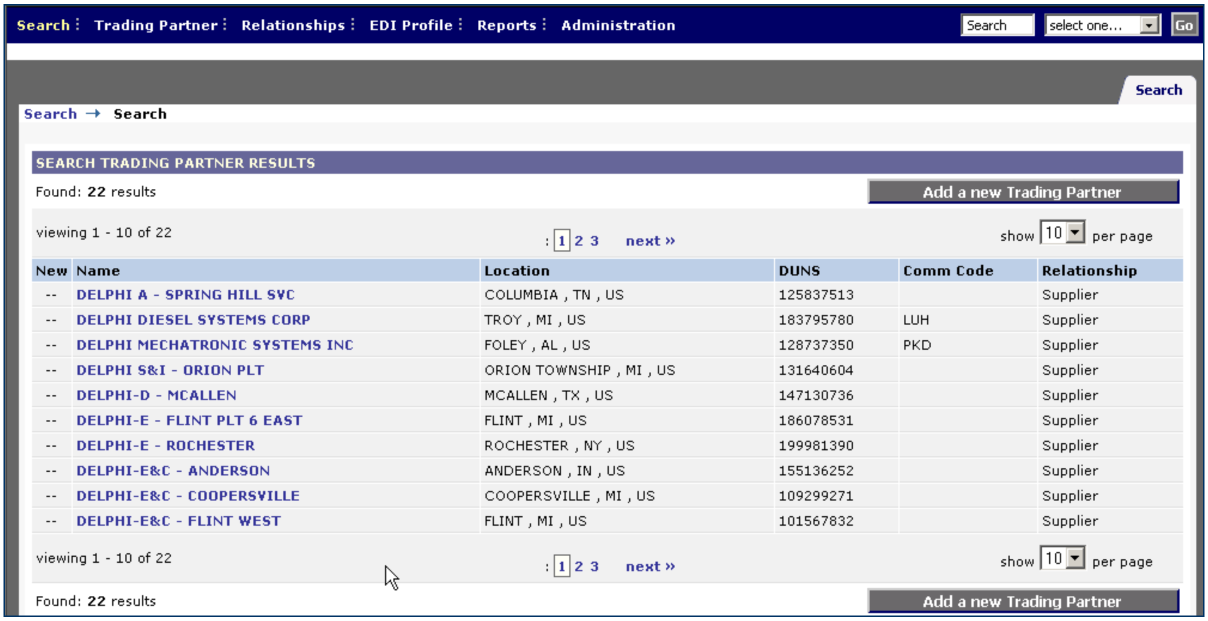


1 From the *Search* tab, identify the type of search you wish to perform. Options include:

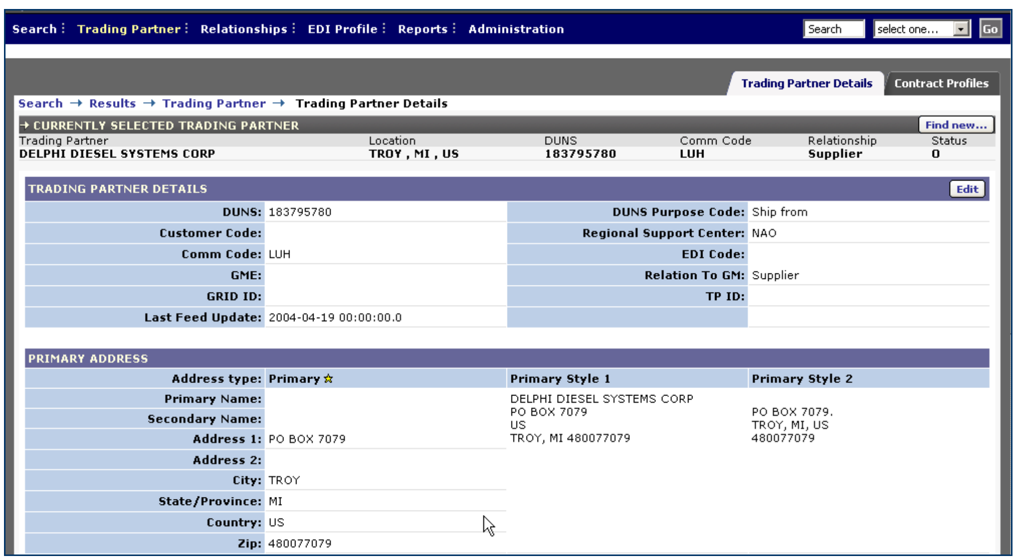
SEARCH TYPE	DESCRIPTION
Begins with…	**Searches for and renders results that begin with the criteria you enter.**
Contains…	**Searches for and renders results that contain the criteria you enter <u>anywhere</u> within the text.**

2 Key in search criteria. (Note: narrow the search results by adding additional search criteria).

3 Click **Search**. The Search Results screen is displayed.



4 In the Name column, click on the ***name*** of the trading partner you wish to manage. The Trading Partner Details screen is displayed.



RESULT

You have successfully searched for a trading partner.

TOPIC REVIEW

Summary

You have just completed ***MODULE 1.*** You are now able to:

- Define CATS Overview and User Roles
- Log in to CATS
- Identify elements of the Home screen
- Performing searches

In this module, we have defined the CATS application, user roles, as well as procedures for logging in to the application.

The next module will cover managing trading partners and relationships.

MODULE 2: MANAGING TRADING PARTNERS & RELATIONSHIPS

Overview

The purpose of this module is to manage trading partners, including trading partner details and contract profiles.

Objectives

Upon completion of this module, participants are able to:

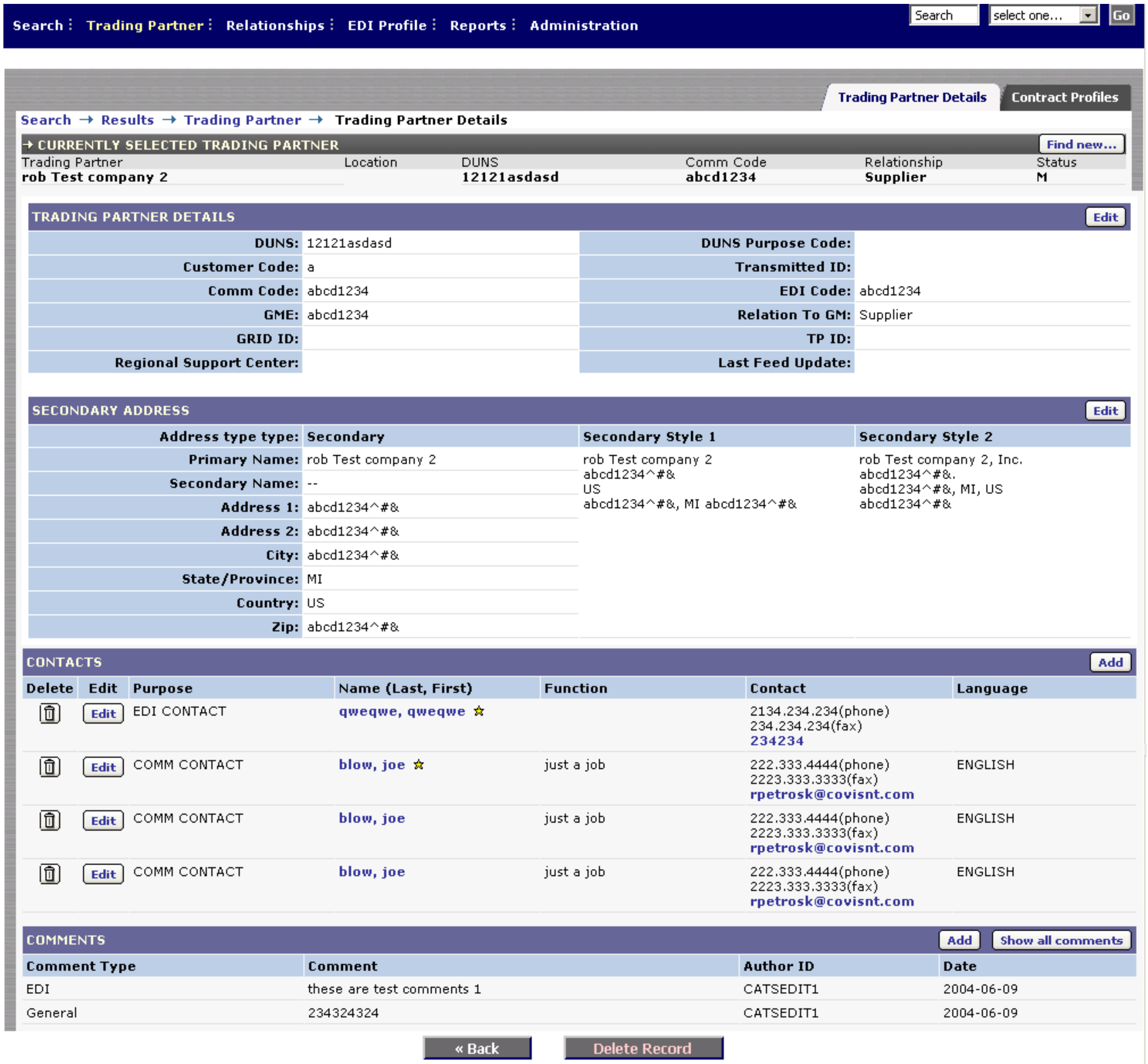
- Edit existing Trading Partner Information
- Manage Contact Profile
- Viewing Relationship Details

Managing Trading Partner Details

Upon searching and selecting a trading partner, Administrators are able to manage information from the Trading Partner Details screen. (Refer to the previous section entitled Performing Searches for further details). You are able to add, edit, or delete the following details:

- Trading Partner Name
- DUNS
- DUNS Purpose Code
- Comm Code
- GRID ID
- Customer Code
- GME
- Relation To GM
- EDI Code
- TP ID

⚠	Trading Partner relationships are created and updated via a weekly supplier load file, which is uploaded to CATS via the Covisint Connect application.



Managing Trading Partner Details

1 Perform one or more of the following:

IF YOU WISH TO...	THEN...

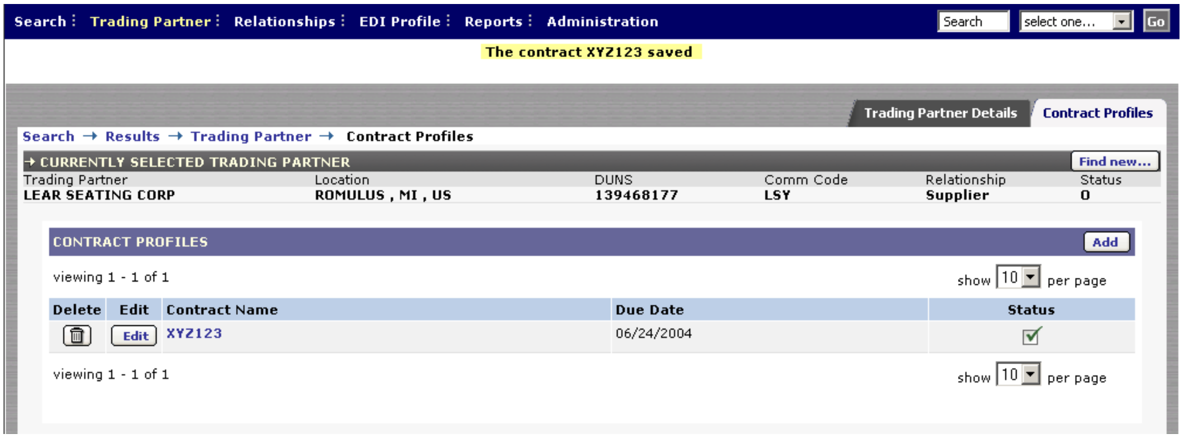
Edit details of the trading partner.	**1** Click **Edit** in the Trading Partner Details section. The Edit Details screen is displayed. **2** Edit the details as desired. **3** Click **Save Changes**. The information is updated, and the Edit Details screen is displayed.
Modify a Secondary Address	**1** Click **Edit** in the Secondary Address section. The Edit Secondary Address screen is displayed. **2** Modify the address as desired. **3** Click **Save Changes**. The information is updated, and the Edit Details screen is displayed.
Delete a Secondary Address	**1** Click **Edit** in the Secondary Address section. The Edit Secondary Address screen is displayed. **2** Click **Delete this Address**. **3** Click **OK** from the confirmation box. The Edit Secondary Address screen is displayed.
Add a new contact for the profile	**1** Click **Add** in the Contacts section. The Add Contacts screen is displayed. **2** Key in all contact information as required. **3** Click **Save Addition.**
Modify a Profile Contact	**1** Click **Edit** in the Edit Column of the contact person you wish to modify. The Edit Contact screen is displayed. **2** Modify the information as desired. **3** Click **Save Changes**. The information is updated, and the Edit Details screen is displayed.
Delete a Profile Contact	**1** Click **Delete** in the Delete Column of the contact person you wish to remove as the contact for this profile. **2** Click **OK** from the confirmation box. The Edit Secondary Address screen is displayed.
Add Comments	**1** Click **Add** in the Comments section. The Add A Comment screen is displayed. **2** Select the *comment type* from the drop down list. **3** Key in your comment in the *comment* open text field. **4** Click **Save comment**.

RESULT

You have successfully managed trading partner information.

Managing Contract Profiles

Upon searching and selecting a trading partner, Administrators are able to manage contract profiles from the Contract Profiles screen. (Refer to the previous section entitled Performing Searches for further details).



1 Click **Contract Profiles** tab from the Trading Partner screen. The profiles are displayed.

2 Perform one of the following:

If You Wish To...	**Then...**
Add a new profile contract	**a** Click **Add**. **b** Key in profile information as required: *Contract name* *Due Date (via the calendar icon)* *Status (Accepted, Rejected, Pending)* **c** Click **Save Addition**.
Modify an existing profile contract	**a** Click  in the edit column of the profile you wish to modify. **b** Modify as desired: *Contract name* *Due Date (via the calendar icon)* *Status (Active, Rejected, Pending)* **c** Click **Save Addition**.
Delete an existing profile contract	**a** Click  in the delete column of the profile you wish to delete. **b** Click **OK** from the confirmation dialog box.

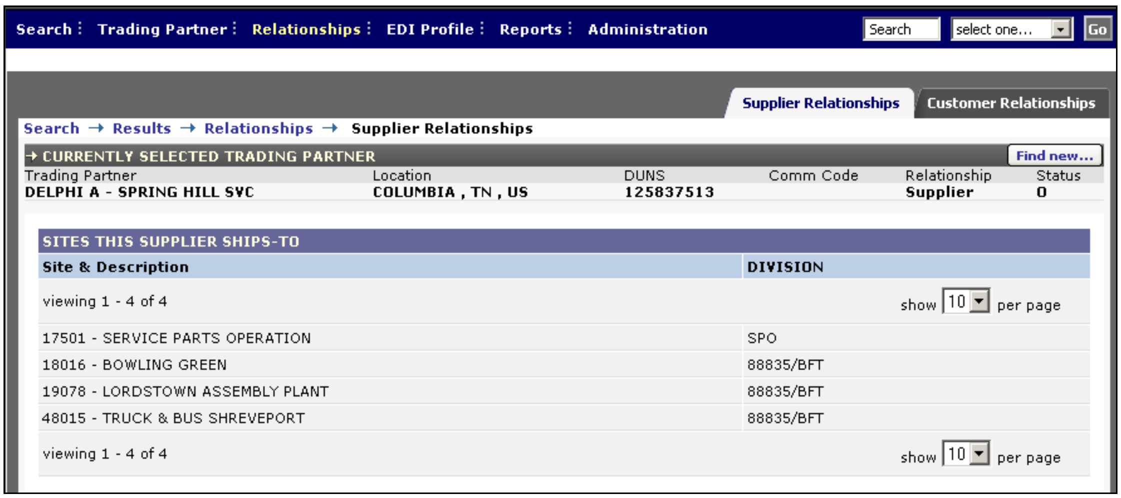
Result

You have successfully managed contract profile information.

Viewing Existing Relationship Details

Complete the following to steps to view Relationships.

1. Perform a search and select the Trading Partner for whom you wish to view relationships.
2. Click the **Relationship** Menu.
3. Click either the **Supplier Relationships** or **Customer Relationships** tab to view details of the relationship. The Relationship screen is displayed.



Trading Partner relationships are <u>created</u> and <u>updated</u> via a weekly supplier load file, which is uploaded to CATS via the Covisint Connect application.

RESULT

You have successfully viewed relationship details.

TOPIC REVIEW

Summary

You have just completed ***MODULE 2.*** You are now able to:

- Edit existing Trading Partner Information
- Manage Contact Profiles
- Viewing Relationship Details

In this module, we have defined the processes and procedures for managing trading partners, and viewing relationship details.

The next module will cover managing EDI details.

MODULE 3: MANAGING EDI PROFILES

Overview

The purpose of this module is to identify the detailed processes and procedures for managing EDI profiles used within the CATS application.

Objectives

Upon completion of this module, participants are able to manage:

- Supplier Certification
- Customer Certification
- Connectivity
    - Mailboxes
    - Direct Links

Introduction

Administrators are responsible for maintaining profiles, creating new profiles, maintaining profile users and contacts, and maintaining sender/receiver codes.

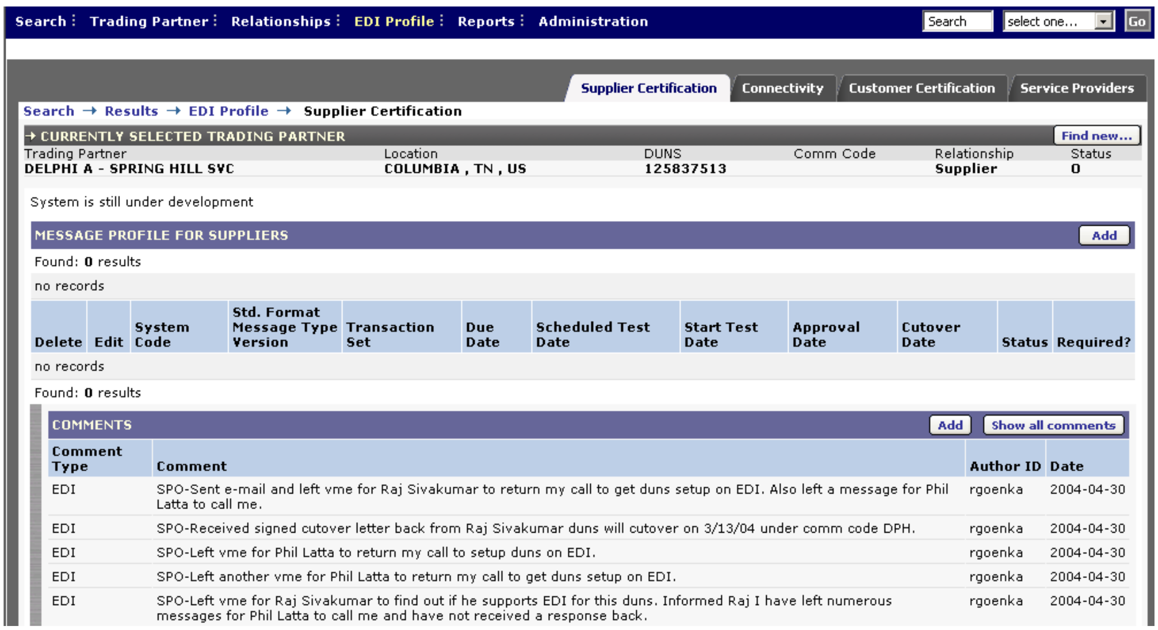
Managing Supplier Certification

From the Supplier Certification tab, Administrators are able to view and manage message profiles for the supplier, add comments, and view a history of all comments.

1 Perform a search and select the Trading Partner for whom you wish to manage supplier certification.

2 Click the **EDI Profile** Menu.

3 Click **Supplier Certification** tab. The Supplier Certification screen is displayed.



4 Perform one or more of the following:

If You Wish To…	Then…
Add a Message Profile	Proceed to the section entitled *Adding Message Profiles*.
Edit a Message Profile	Proceed to the section entitled *Editing Message Profiles*.
Delete a Message Profile	Proceed to the section entitled *Deleting Message Profiles*.
Record a comment to a Trading Partner record	Proceed to the section entitled *Recording Comments to a Trading Partner Record*.

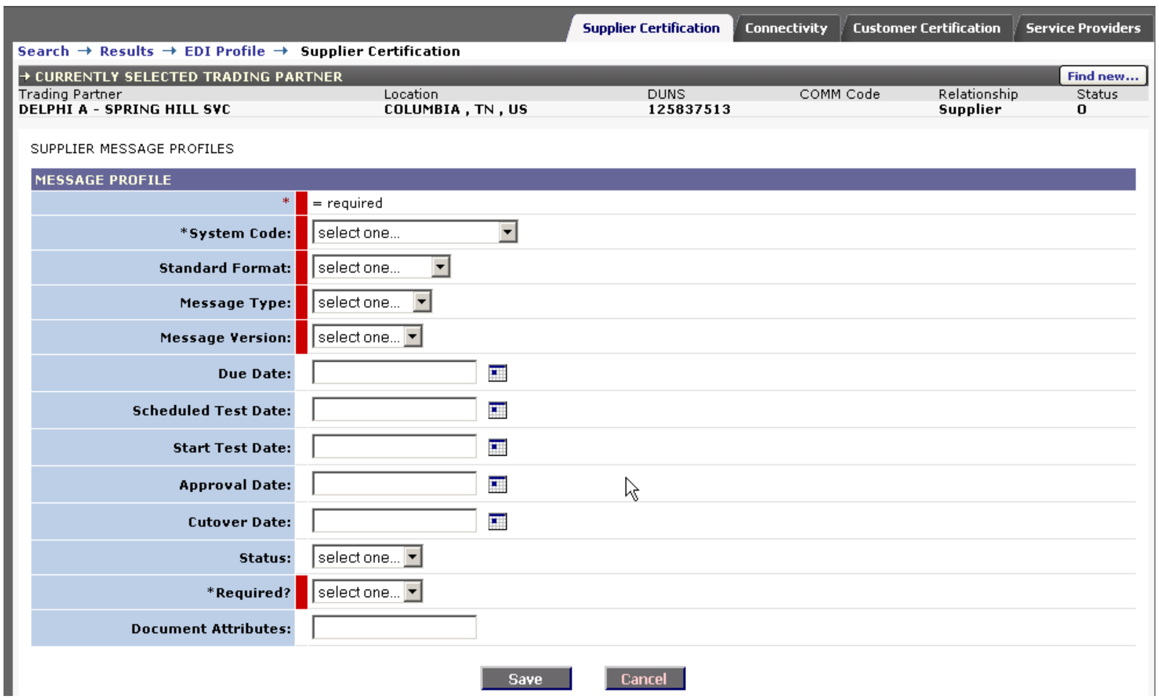
Adding Message Profiles

1 Perform a search and select the Trading Partner for whom you wish to manage supplier certification.

2 Click the **EDI Profile** Menu.

3 Click **Supplier Certification** tab. The Supplier Certification screen is displayed.

4 Click **ADD** in the Message Profile for Suppliers section. The Add a Message Profile screen is displayed.



5 Set up the Message Profile for this trading partner by selecting the required information from each drop box:

5.1 Select the *System Code* from the drop box.

5.2 Select the message *Standard Format* from the drop box.

5.3 Select the *Message Type* from the drop box.

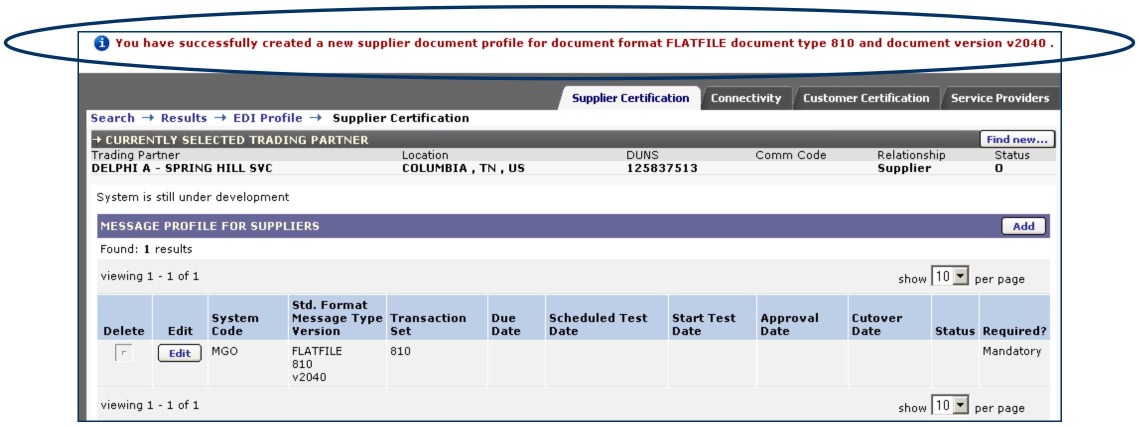
5.4 Select the *Version* of the message type from the drop box.

5.5 Select the *Requirement* status from the drop box.

5.6 Set additional optional fields as desired.

Use the Date fields on this screen to document the certification process. For example, select the date by which this profile certification is due. Also, set the test and approval dates as they occur. The Cutover Date field also logs when the cutover is scheduled to occur, according to the project, test plan, etc.

6 Click **Save Addition**. The screen refreshes, the new message profile is displayed, and is confirmed in the message at the top of the screen.



RESULT

You have successfully added a message profile for a Trading Partner.

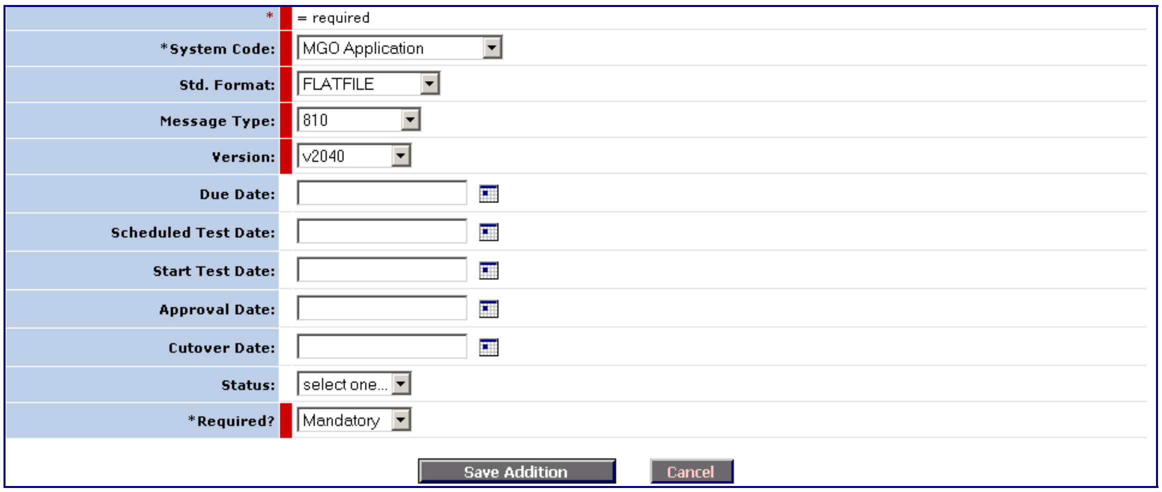
Editing Message Profiles

1 Perform a search and select the Trading Partner for whom you wish to manage supplier certification.

2 Click the **EDI Profile** Menu.

3 Click **Supplier Certification** tab. The Supplier Certification screen is displayed.

4 Click **EDIT** in the Edit column of the Message Profile you wish to modify. The Edit a Message Profile screen is displayed.



5 Edit fields as you wish.

6 Click **Save Addition**. The screen refreshes, the revised message profile is displayed, and is confirmed in the message at the top of the screen.

RESULT

You have successfully edited an existing Message Profile.

Deleting Message Profiles

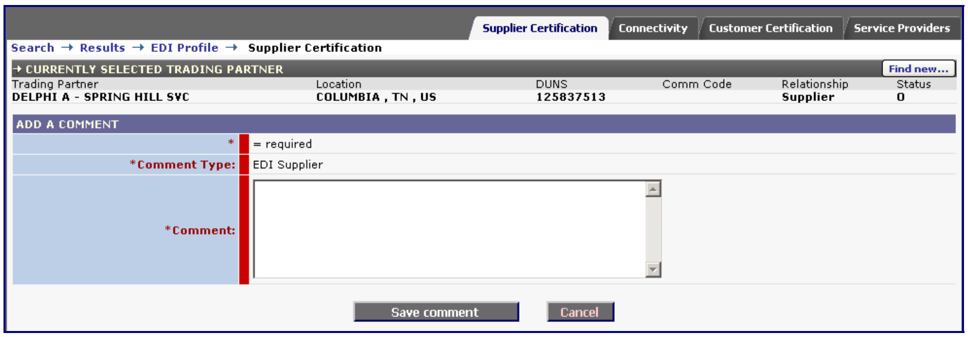
1. Perform a search and select the Trading Partner for whom you wish to manage supplier certification.
2. Click the **EDI Profile Menu**.
3. Click **Supplier Certification** tab. The Supplier Certification screen is displayed.
4. Click **DELETE** in the Delete column of the Message Profile you wish to remove.
5. Click **OK** from the Delete Confirmation dialog box. The screen refreshes and the message profile is no longer displayed.

RESULT
You have successfully deleted an existing Message Profile.

Recording Comments to a Trading Partner Record

You are able to add comments to a profile. This should be performed as a method of documenting and recording the maintenance you are performing on the profile.

1. Perform a search and select the Trading Partner for whom you wish to record comments.
2. Click the **EDI Profile** Menu.
3. Click **Supplier Certification** tab. The Supplier Certification screen is displayed.
4. Click **ADD** in the Comments section of the Supplier Certification screen. The Add a Comment screen is displayed.



5. In the Comments open text field, key in your comments. Recall that your comments are viewable and readable by other users.
6. Click **Save comment**. The screen refreshes, and your comment is saved to this profile.

View additional comments by clicking **Show recent comments.**

RESULT

You have successfully added a comment to a Message Profile.

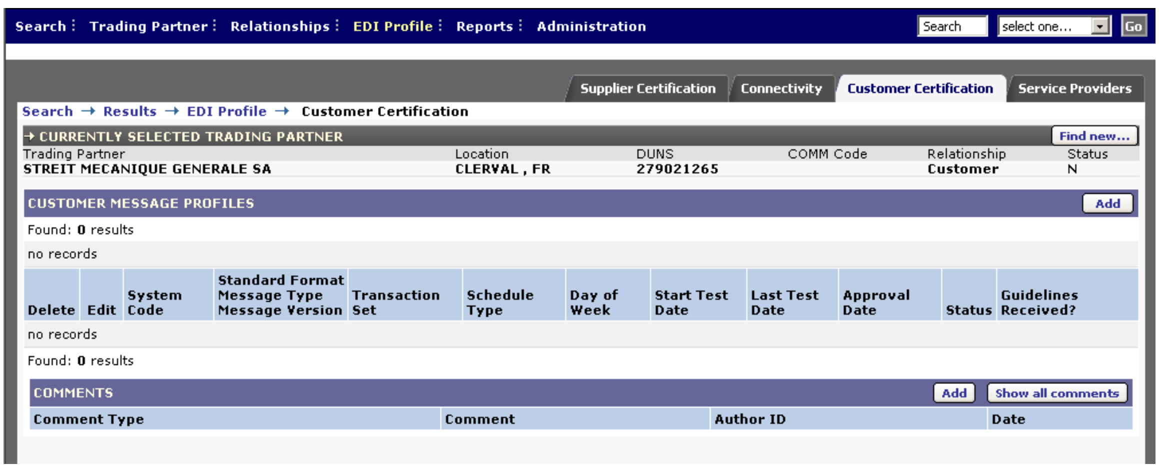
Managing Customer Certification

From the Customer Certification tab, Administrators are able to view and manage message profiles for their customers, add comments, and view a history of all comments.

1 Perform a search and select the Trading Partner for whom you wish to manage customer certification.

2 Click the **EDI Profile** Menu.

3 Click **Customer Certification** tab. The Customer Certification screen is displayed.



4 Perform one or more of the following:

If You Wish To...	**Then...**
Add a Message Profile	Proceed to the section entitled *Adding Message Profiles*.
Edit a Message Profile	Proceed to the section entitled *Editing Message Profiles*.
Delete a Message Profile	Proceed to the section entitled *Deleting Message Profiles*.
Record a comment to a Trading Partner record	Proceed to the section entitled *Recording Comments to a Trading Partner Record*.

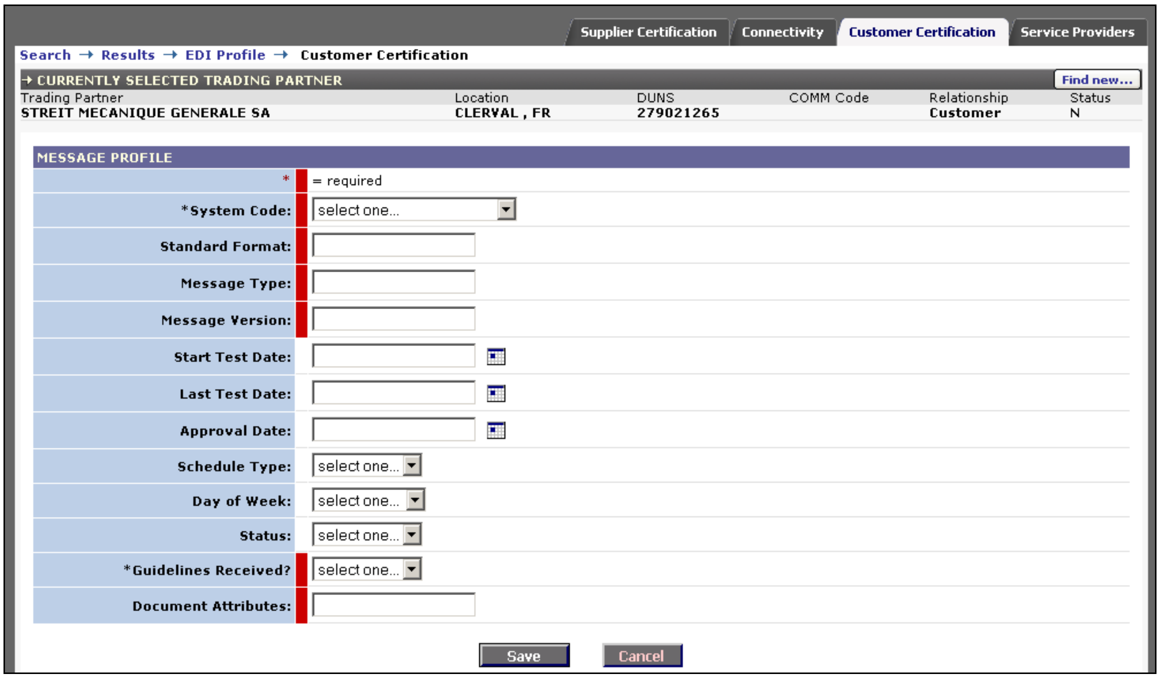
Adding Message Profiles

1 Perform a search and select the Trading Partner for whom you wish to manage customer certification.

2 Click the **EDI Profile** Menu.

3 Click **Customer Certification** tab. The Customer Certification screen is displayed.

4 Click **ADD** in the Message Profile for Suppliers section. The Add a Message Profile screen is displayed.



5 Set up the Message Profile for this trading partner by selecting the required information from each drop box:

5.1 Select the *System Code* from the drop box.

5.2 Key in the message *Standard Format* in the open text field.

5.3 Key in the *Message Type* in the open text field.

5.4 Key in the Message *Version* in the open text field.

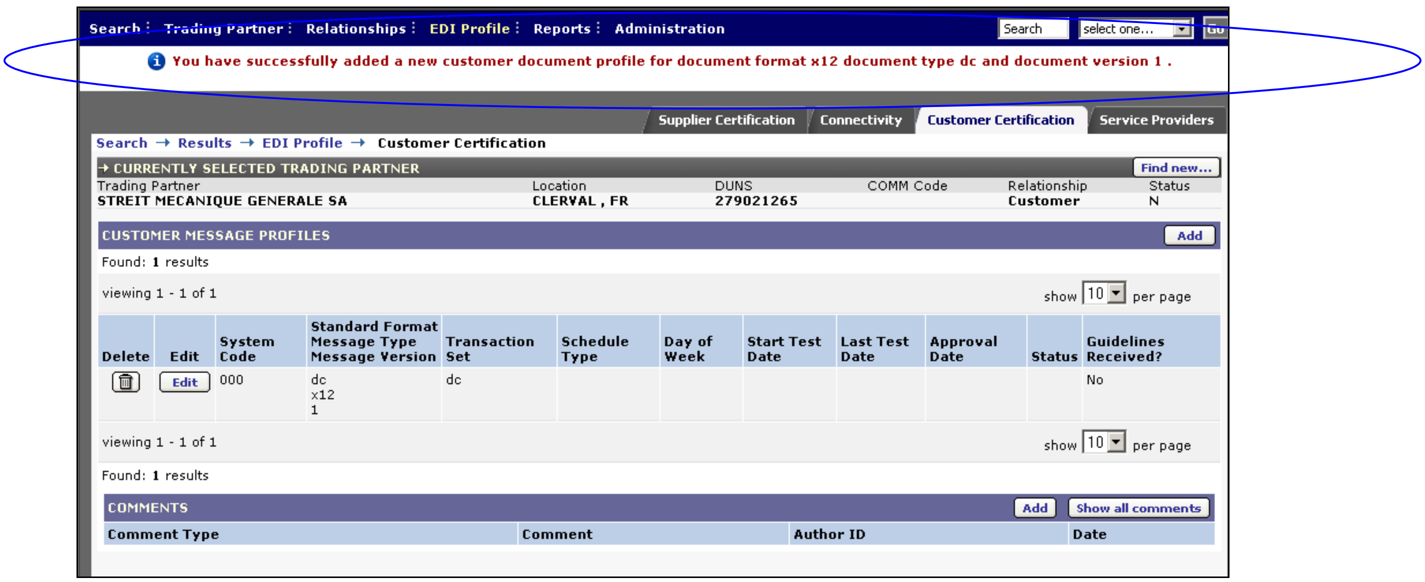
5.5 Select the *Guidelines Received* status from the drop box.

5.6 Key in the *Document Attributes* in the open text field.

5.7 Set additional optional fields as desired.

> Use the Date fields on this screen to document the certification process. For example, select the date by which this profile certification is due. Also, set the test and approval dates as they occur. The Cutover Date field also logs when the cutover is scheduled to occur, according to the project, test plan, etc.

6 Click **Save**. The screen refreshes, the new message profile is displayed, and is confirmed in the message at the top of the screen.



Result

You have successfully added a message profile for a Trading Partner.

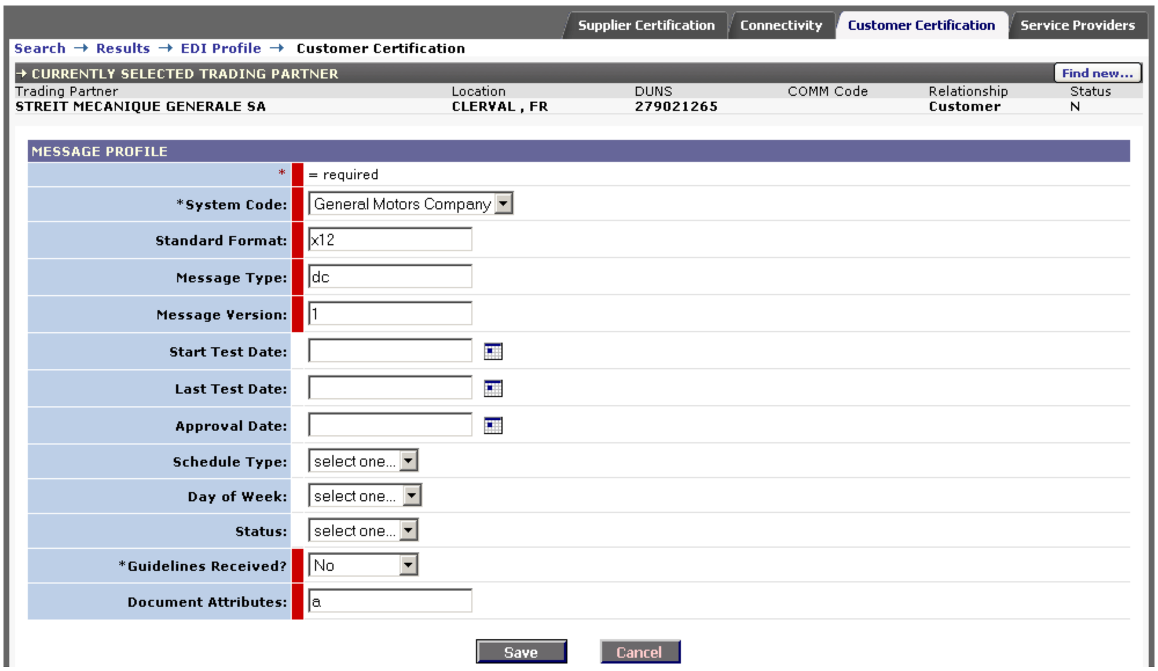
Editing Message Profiles

1 Perform a search and select the Trading Partner for whom you wish to manage customer certification.

2 Click the **EDI Profile** Menu.

3 Click **Customer Certification** tab. The Customer Certification screen is displayed.

4 Click **EDIT** in the Edit column of the Message Profile you wish to modify. The Edit a Message Profile screen is displayed.



5 Edit fields as you wish.

6 Click **Save**. The screen refreshes, the revised message profile is displayed, and is confirmed in the message at the top of the screen.

RESULT

You have successfully edited an existing Message Profile.

Deleting Message Profiles

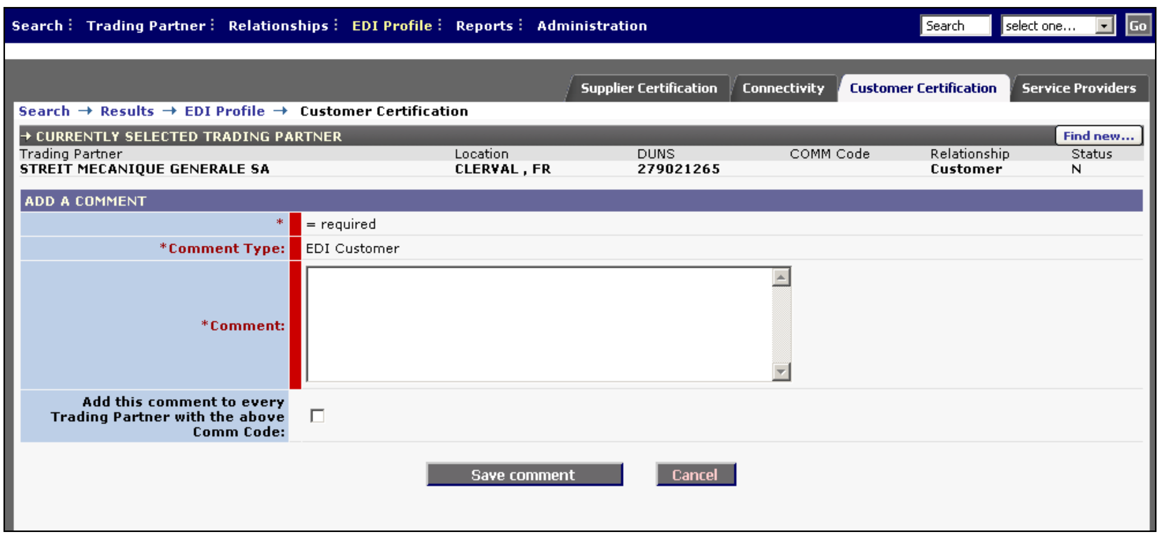
1 Perform a search and select the Trading Partner for whom you wish to manage customer certification.
2 Click the EDI Profile Menu.
3 Click **Supplier Certification** tab. The Customer Certification screen is displayed.
4 Click **DELETE** in the Delete column of the Message Profile you wish to remove.
5 Click **OK** from the Delete Confirmation dialog box. The screen refreshes and the message profile is no longer displayed.

RESULT
You have successfully deleted an existing Message Profile.

Recording Comments to a Trading Partner Record

You are able to add comments to a profile. This should be performed as a method of documenting and recording the maintenance you are performing on the profile.

1 Perform a search and select the Trading Partner for whom you wish to manage supplier certification.
2 Click the **EDI Profile** Menu.
3 Click **Customer Certification** tab. The Customer Certification screen is displayed.
4 Click **ADD** in the Comments section of the Customer Certification screen. The Add a Comment screen is displayed.



5 In the Comments open text field, key in your comments. Recall that your comments are viewable and readable by other users.
6 Enable the checkbox if you wish to add this comment to every Trading Partner with the above Comm Code.
7 Click **Save comment**. The screen refreshes, and your comment is saved to this profile.

View additional comments by clicking **Show recent comments.**

RESULT

You have successfully added a comment to a Trading Partner Record.

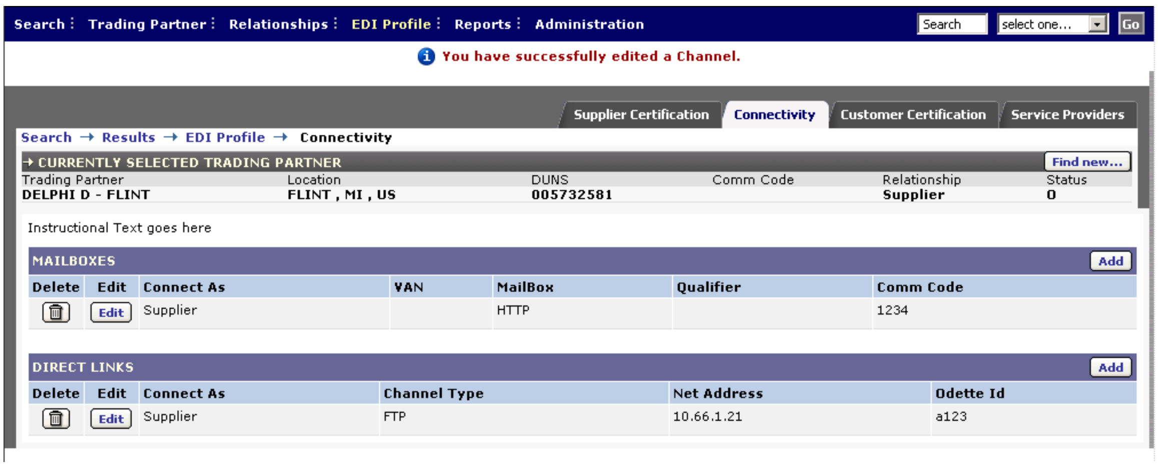
Managing Connectivity

You are able to add, modify, and delete records of connectivity methods for trading partners.

1 Perform a search and select the Trading Partner for whom you wish to manage mailboxes and/or direct links.

2 Click the **EDI Profile** Menu.

3 Click **Connectivity** tab. The Connectivity screen is displayed.

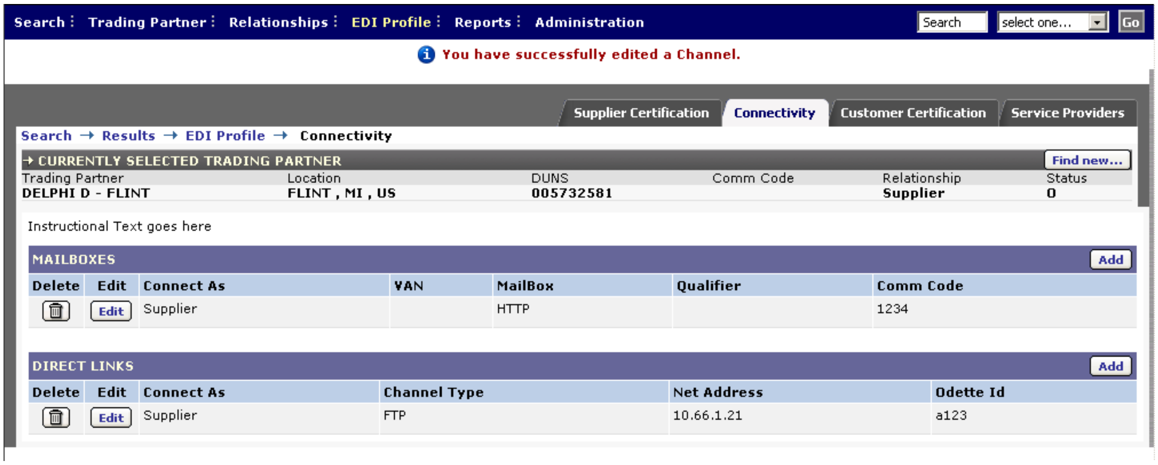


4 Perform one or more of the following:

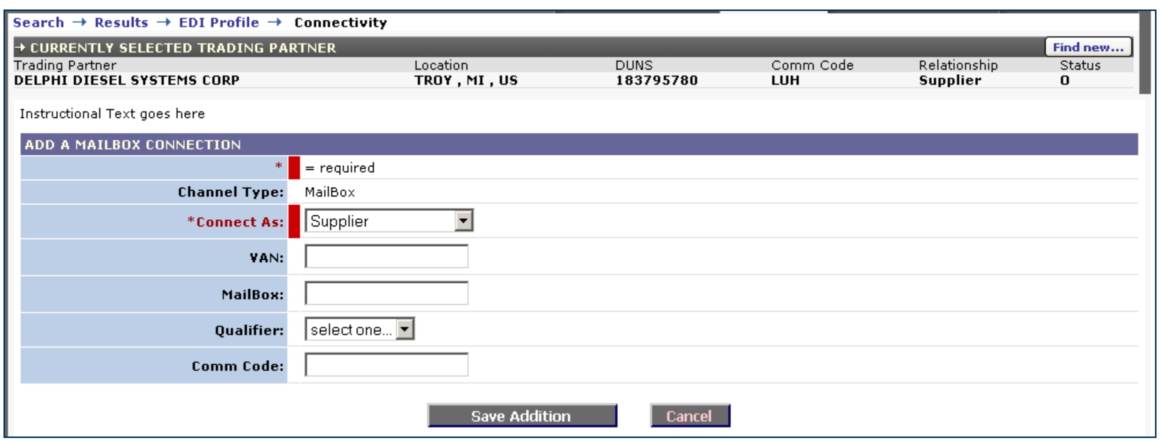
IF YOU WISH TO...	THEN...
Add a Mailbox	Proceed to the section entitled *Adding a Mailbox*.
Edit a Mailbox	Proceed to the section entitled *Editing a Mailbox*.
Delete a Mailbox	Proceed to the section entitled *Deleting a Mailbox*.
Add a Direct Link	Proceed to the section entitled *Adding a Direct Link.*
Edit a Direct Link	Proceed to the section entitled *Editing a Direct Link.*
Delete a Direct Link	Proceed to the section entitled *Deleting a Direct Link.*

Adding a Mailbox

Complete the following steps to record a new mailbox for a trading partner from the **Connectivity** tab of the **EDI Profile** menu.



1 Click **ADD** in the Mailboxes section of the screen. The Add a Mailbox Connection screen is displayed.



2 From the *Connect As* drop box, select the type of user this trading partner is connecting as. For example, connecting as a *Supplier, Customer, Supplier and Customer,* or *Service Provider.*

3 Key in optional information as needed. This includes *VAN, Mailbox, Qualifier*, and *Comm Code* information.

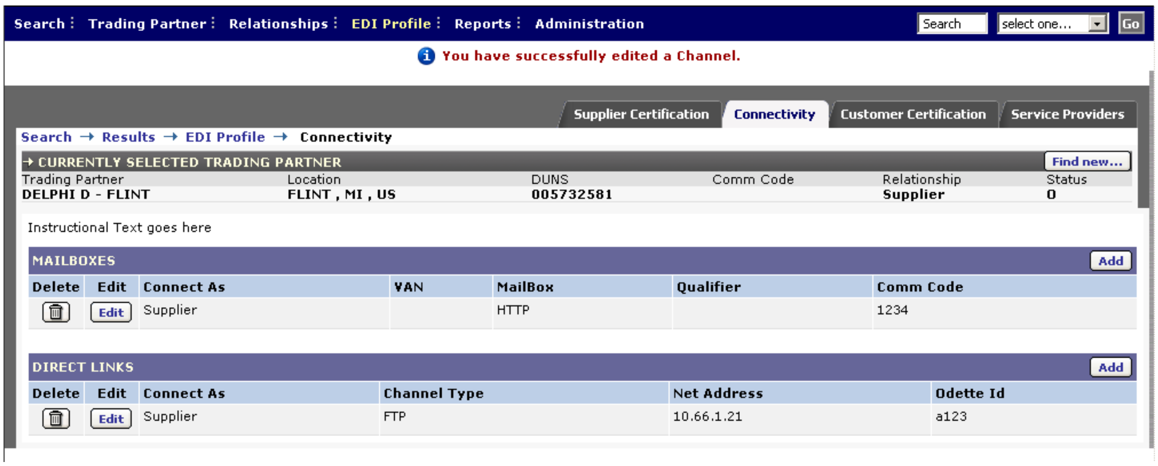
4 Click **Save Addition**. The screen refreshes, the new message profile is displayed, and is confirmed in the message at the top of the screen.

RESULT

You have successfully added a mailbox to a Trading Partner Record.

Deleting a Mailbox

Complete the following steps to delete a mailbox record for a trading partner from the **Connectivity** tab of the **EDI Profile** menu.



1 In the Mailboxes section of the screen, click  in the Delete column of the mailbox you wish to delete.

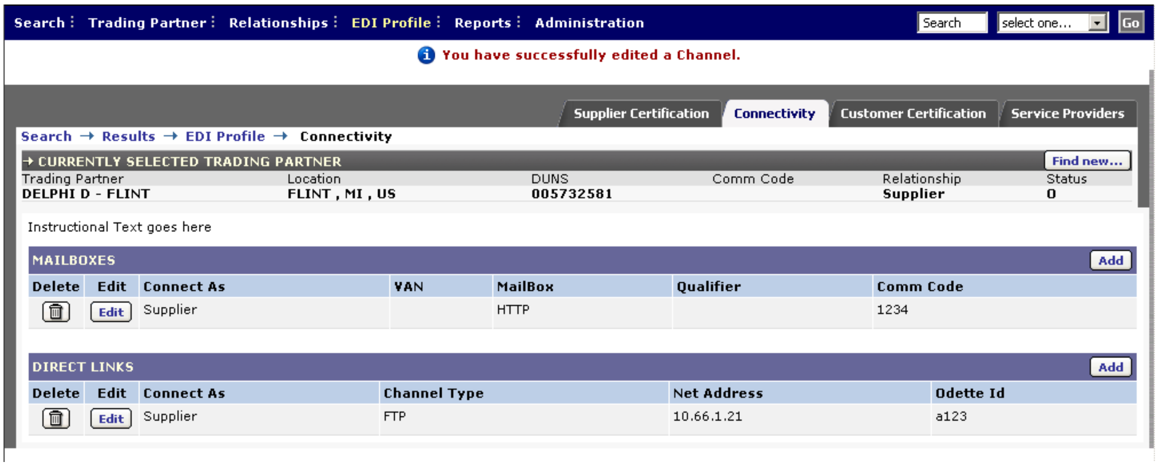
2 Click **OK** on the confirmation dialog box to confirm the deletion request. The screen is refreshed, and the mailbox is no longer displayed.

RESULT

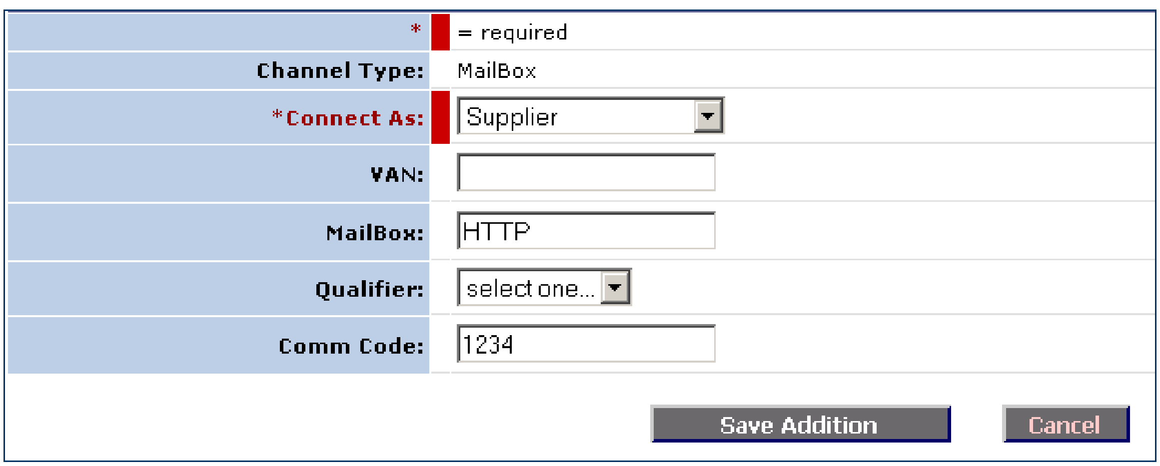
You have successfully deleted a mailbox to a Trading Partner Record.

Editing a Mailbox

Complete the following steps to record a new mailbox for a trading partner from the **Connectivity** tab of the **EDI Profile** menu.



1 In the Mailboxes section of the screen, click **Edit** in the Edit column of the mailbox you wish to modify. The Edit Mailbox screen is displayed.



2 From the *Connect As* drop box, select the type of user this trading partner is connecting as. For example, connecting as a *Supplier, Customer, Supplier and Customer,* or *Service Provider.*

3 Key in optional information as needed. This includes *VAN, Mailbox, Qualifier*, and *Comm Code* information.

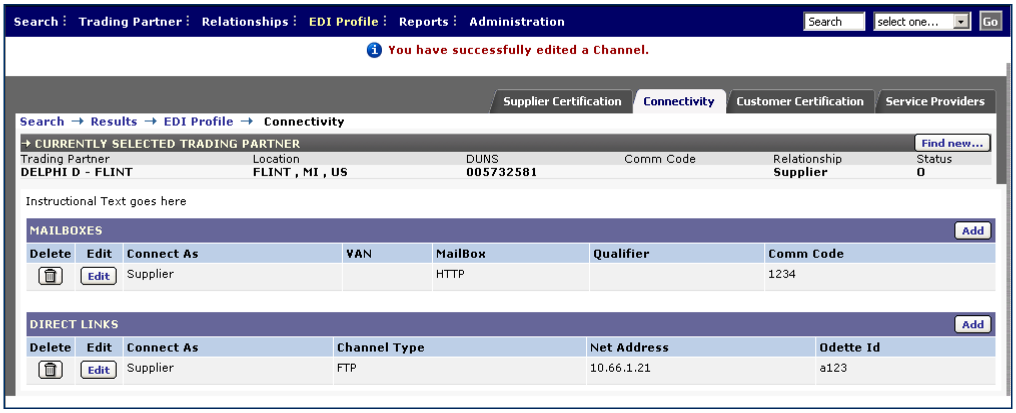
4 Click **Save Addition**. The screen refreshes, the edited message profile is displayed, and is confirmed in the message at the top of the screen.

RESULT

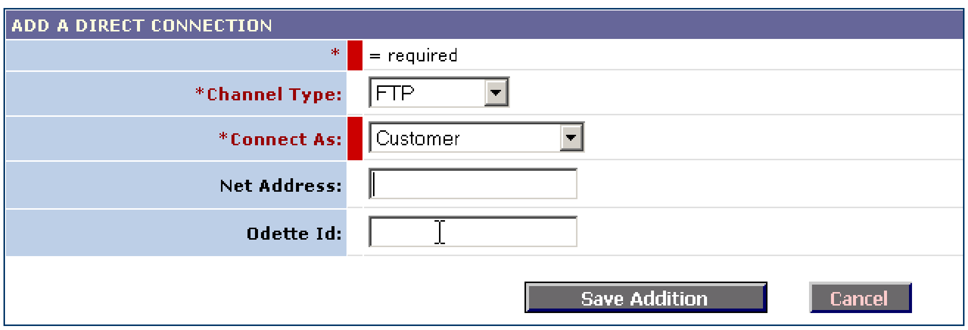
You have successfully edited a mailbox of a Trading Partner Record.

Adding a Direct Link

Complete the following steps to record a new direct link for a trading partner from the **Connectivity** tab of the **EDI Profile** menu.



1 Click **ADD** in the Direct Links section of the screen. The Add a Direct Connection screen is displayed.



2 From the *Channel Type* drop box, select the type of channel with which this trading partner is connecting. For example, channel type could include *FTP, Mailbox, or ISDN.*

3 From the *Connect As* drop box, select the type of user this trading partner is connecting as. For example, connecting as a *Supplier, Customer, Supplier and Customer,* or *Service Provider.*

4 Key in optional information as needed. This includes *Net address and Odette ID* information.

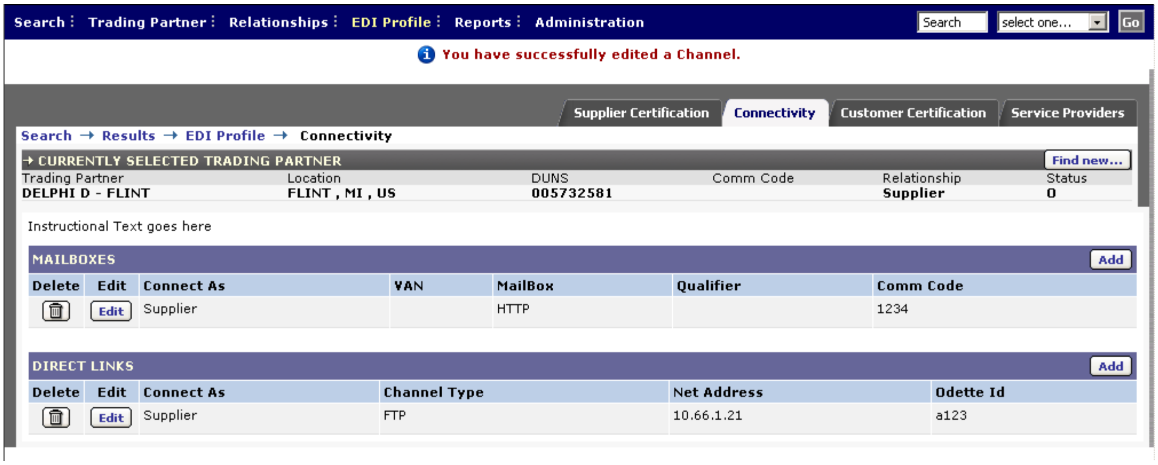
5 Click **Save Addition**. The screen refreshes, the new direct connection is displayed, and is confirmed in the message at the top of the screen.

RESULT

You have successfully added a direct connection to a Trading Partner record.

Deleting a Direct Link

Complete the following steps to delete a direct link record for a trading partner from the **Connectivity** tab of the **EDI Profile** menu.



1. In the Direct Links section of the screen, click  in the Delete column of the direct connection you wish to delete.

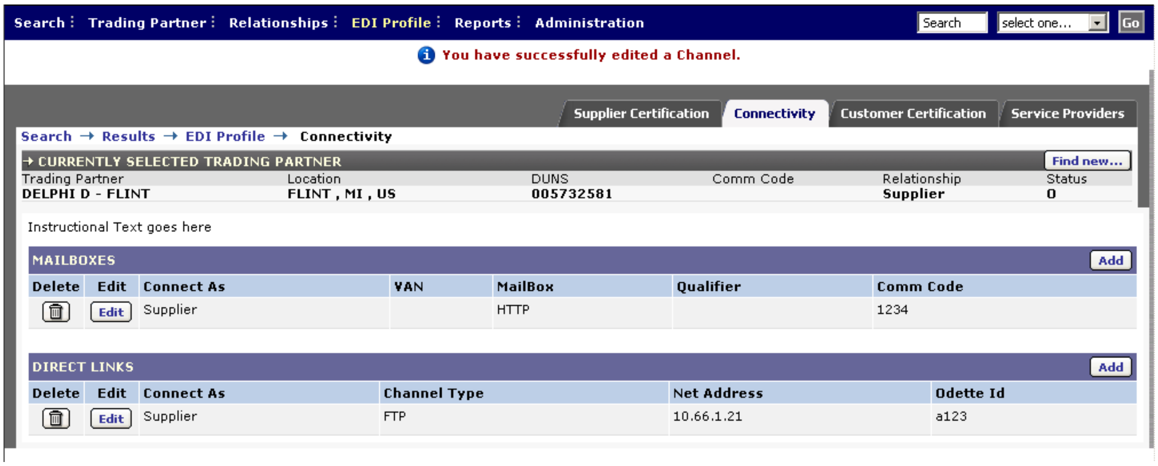
2. Click **OK** on the confirmation dialog box to confirm the deletion request. The screen is refreshed, and the direct link is no longer displayed.

RESULT

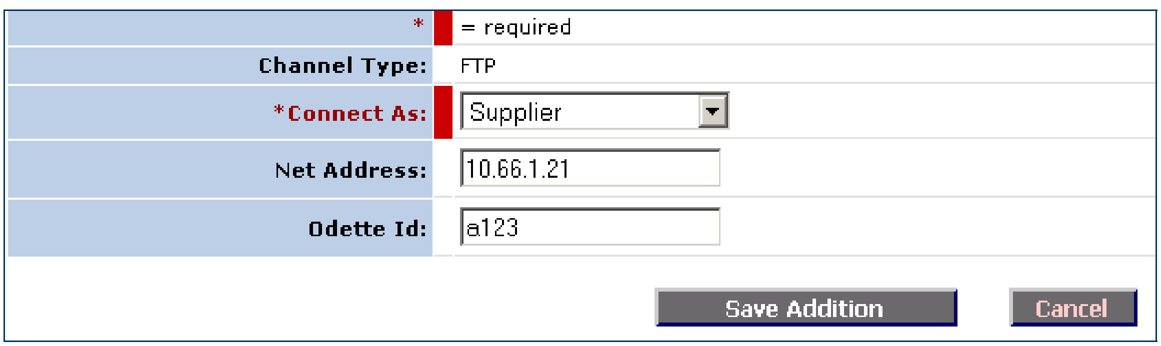
You have successfully deleted a direct link to a Trading Partner record.

Editing a Direct Link

Complete the following steps to record a new mailbox for a trading partner from the **Connectivity** tab of the **EDI Profile** menu.



1 In the Direct Links section of the screen, click Edit in the Edit column of the direct link you wish to modify. The Edit Direct Link screen is displayed.



2 From the *Connect As* drop box, select the type of user this trading partner is connecting as. For example, connecting as a *Supplier, Customer, Supplier and Customer,* or *Service Provider.*

3 Key in optional information as needed. This includes *Net address and Odette ID* information.

4 Click **Save Addition**. The screen refreshes, the modified direct connection is displayed, and is confirmed in the message at the top of the screen.

RESULT

You have successfully edited a direct connection of a Trading Partner Record.

TOPIC REVIEW

Summary

You have just completed ***MODULE 4.*** You are now able to:

- Supplier Certification
- Customer Certification
- Connectivity
  - Mailboxes
  - Direct Links

In this module, we have defined the processes and procedures for managing EDI Profiles.

The next module will cover generating reports.

MODULE 4: GENERATING REPORTS

Overview

The purpose of this module is to identify and describe the process of generating reports.

Objectives

Upon completion of this module, participants will be able to:

- Create Reports
    - Public Queries
    - Private Queries
    - Fax Activity
- Save reports
- Adding queries to a report

Creating Reports

Reports are available to Administrators, in various formats. The following table describes all of the available reports within the application.

REPORT TYPE	DESCRIPTION
Public Queries	AdHoc SQL query reports that are available for EVERYONE to run as either html display on the screen or csv file download.
Private Queries	AdHoc SQL query reports that are private to each user run as either html display on the screen or csv file donwload.
Weekly Variances	Covisint receives a weekly Supplier Load from GM that includes all the GM suppliers and the GM sites (plants) to whom they ship. This report shows all the GM sites and the count of suppliers that ship to each before and after the update was run. If the count of suppliers that ship to a plant is changed by more than 5%, or if a previously existing GM Site was not received in the Weekly Supplier Load, then these situations are flagged and highlighted as potential problem sites with the load, and reported as Weekly Variances.
Fax Activity	A daily report that is sent to Covisint from EDS showing GM fax activity for the day. This report allows users to view the report via the CATS application.

Complete the following steps to generate a report.

1 Click **Reports**. The Reports screen is displayed.

2 From the Reports screen, click the *tab* of the report type you wish to generate.

Generating Public or Private Query Reports

Generate either a public or private query report by completing the following steps from the **Reports** menu option.

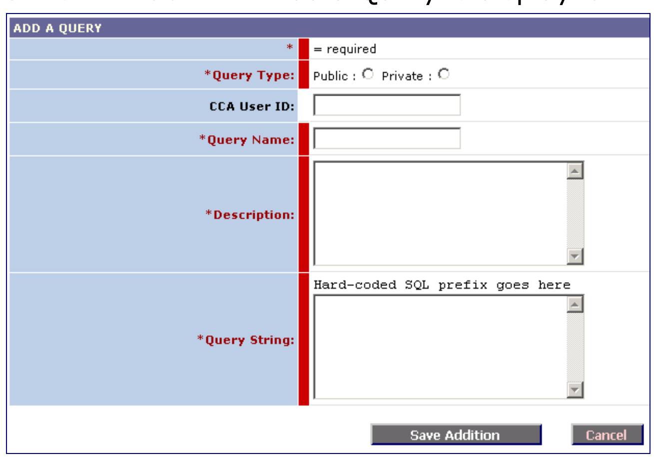
1 Click either the Public Query or Private Query tab.

Recall that:

- **Public Query** reports are available for EVERYONE to generate as either html display on the screen or csv file download.
- **Private Query** reports are private to each user, generated as either html display on the screen or csv file donwload.

2 Set report filter criteria as desired:

IF YOU WISH TO...	THEN...

View a query report online as HTML	**a** In the Report Name column, click on the *name of the report* you wish to view. **b** Scroll the report via the vertical and/or horizontal scroll bars. **c** Click **Back** to return to the main query page.
Export a query report as a .csv file	**a** In the Report Name column, click on the *name of the report* you wish to export. **b** Click **Save as .csv file** to export the report. **c** Click **Save** in the File Download pop up box. **d** Key in a file name. **e** Select the target location where you want the file saved to your hard drive. **f** Click **Save.** **(Note: Click from the main page of the Query tab next to the report you wish to export if you do not wish to generate the report first).**
Add a query	**a** Click **Add**. The Add a Query is displayed.  **b** Select either the **Public** or **Private** *Query Type* radio button, depending upon the access rights you wish to give this report. **c** If desired, key in your *CCA User ID*. **d** Key in the *Query Name*. **e** Key in the *Description* of this query. **f** Key in the *Query String*. **g** Click **Save Addition.**

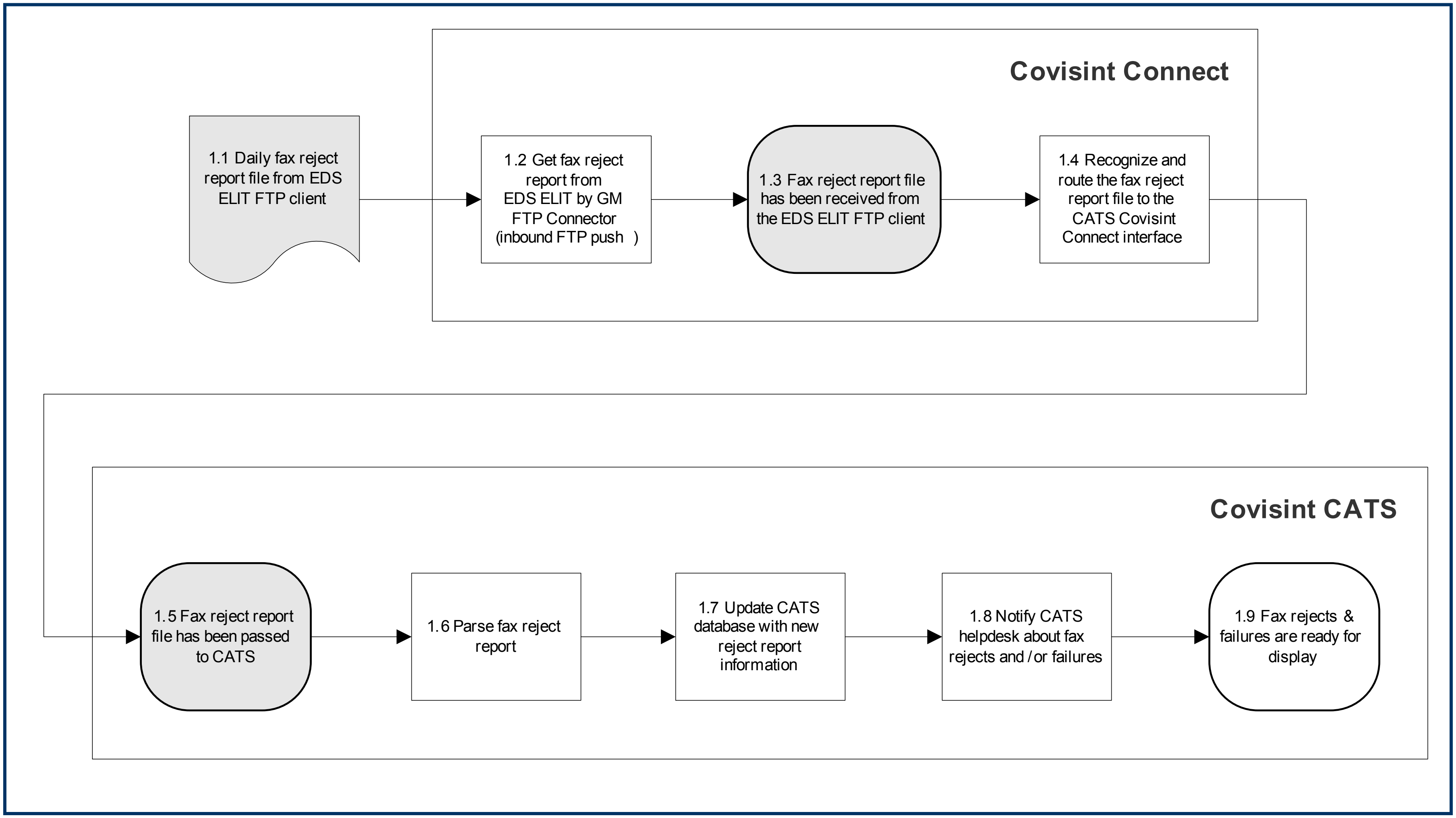
RESULT

You have successfully generated a query report.

Generating Fax Activity Reports

The Oshawa IPC Fax distribution service sends its fax reject activity reports to the EDS ELIT application on a daily basis. Every fax reject report includes the information about errors and failures during the fax transmission process for both bulletins and MGO schedule supplier files. EDS ELIT application passes the fax rejects, called the Fax Activity Report to the CATS application for the logging and processing purposes, as identified in *Figure 1. Fax Reject Reports Process Flow.*

Figure 1. Fax Reject Reports Process Flow



Generate a fax activity report by completing the following steps from the **Reports** menu option.

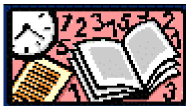
1 Click the **Fax Activity** tab.

2 Set report filter criteria as desired:

IF YOU WISH TO…	THEN…
View a fax activity report online for a date displayed	**a** Click on the date in the *Report Date* column. The report is generated and displayed in HTML format. **b** Scroll via the vertical and horizontal scroll bars as necessary to view the report. **c** Click **Back** to go back to the main report screen.
Export a fax activity report as a .txt file	**a** Click in the row of the report you wish to save. The report is generated in .txt format. **b** Click **Save** on the File Download pop-up box. **c** Key in a *filename* and select the location on your hard drive where the .txt report should be saved. **d** Click **SAVE**. The file is saved in .txt format to your hard drive.
View a fax activity report for a date not currently displayed	**a** Click in the Select a Date field. **b** Select the date for which you wish to view fax activity from the pop-up calendar. **c** Click **View Report**. The report is displayed.

RESULT

You have successfully generated a fax activity report.



TOPIC REVIEW

Summary

You have just completed ***MODULE 5.*** You are now able to:

- Generate Reports
    - Public Queries
    - Private Queries
    - Fax Activity
- Save reports
- Adding Queries to a report

In this module, we have defined the processes and procedures for generating reports.

The next module will cover performing additional administrative tasks.

MODULE 5: MANAGING ADMINISTRATION

Overview

The purpose of this module is to identify tasks required of the CATS Administrator.

Objectives

Upon completion of this module, participants are able to manage:

- Fax Bulletins
- Divisions
- Systems
- Sites
- Manage Queries
- Lookup Codes
- Users (excluding granting Admin and Super Admin privileges)

Introduction

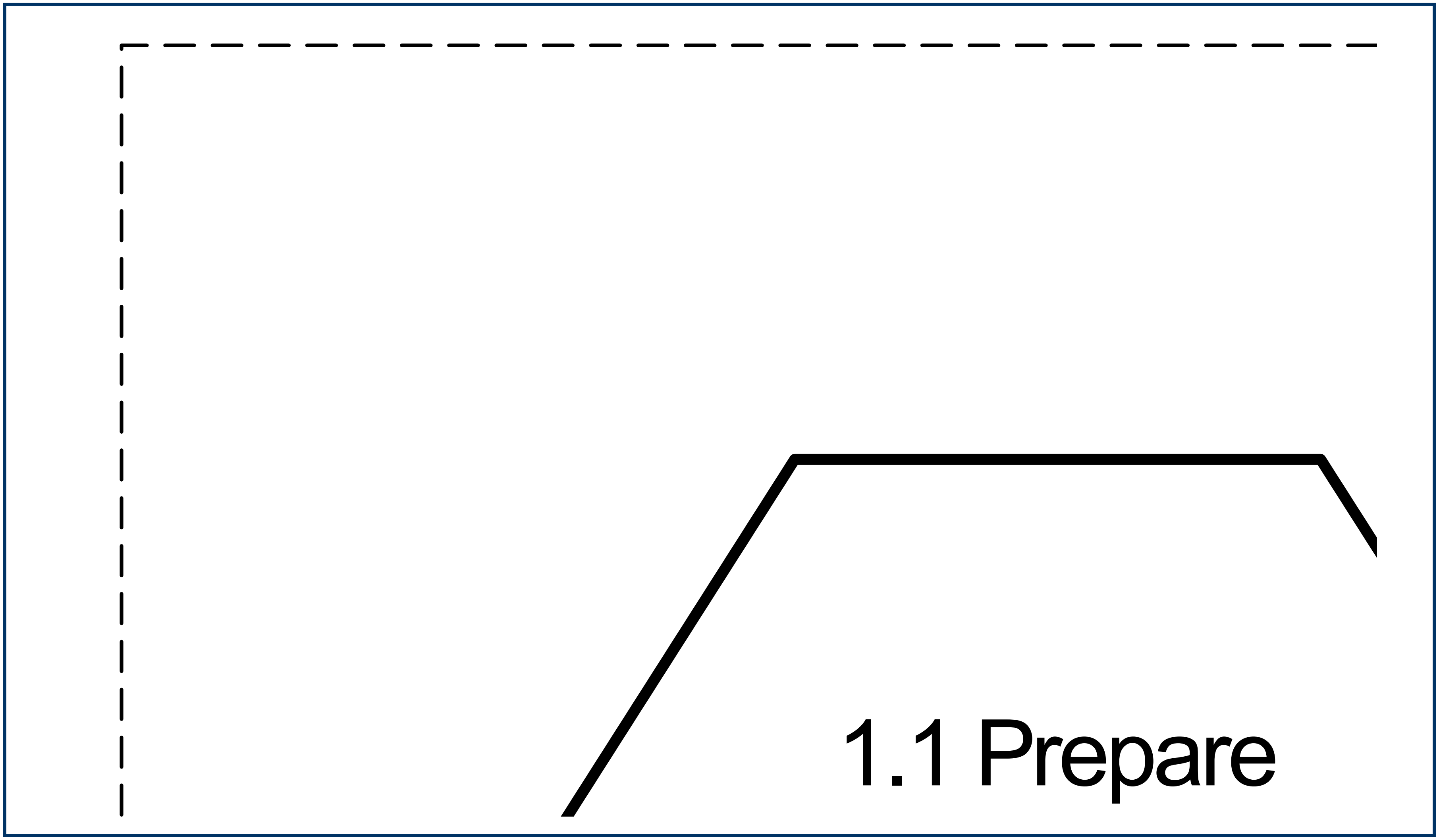
Administrator of the CATS application are responsible for the management of the data stored within the application, pertaining to users, relationships, and fax bulletins to name a few. The following module guides the user through all functionality required to manage and administrate the data stored within the application.

Adding Fax Bulletins

Generating bulletins is the process of faxing ad-hoc bulletins to trading partners. Trading partner distribution lists (fax address books) for bulletin feeds are created based on the ad-hoc criteria via the CATS web interface. The Bulletin itself is created manually and uploaded to the CATS application. All bulletin requests and bulletins are then logged in the CATS database.

Users send fax bulletins to trading partners via the CATS application. To do so, users must upload a Word document and define a distribution list of suppliers to send the document. Once the distribution list and bulletin are ready to be distributed, they are sent to a special FTP mailbox at EDS ELIT for further transmission to the Oshawa IPC fax distribution service, as identified in *Figure 2: Bulletins Process Flow.*

Figure 2: Bulletins Process Flow

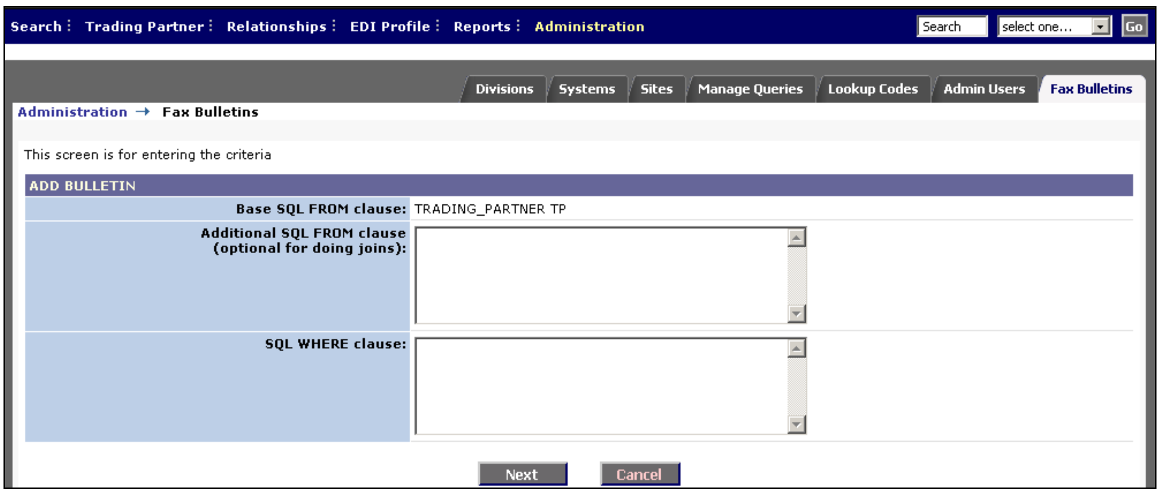


Adding Fax Bulletins

From the Administration menu, complete the following steps to add fax bulletins.

1 Click **Fax Bulletins** tab from the Administration menu.

2 Click **Add new bulletin.**



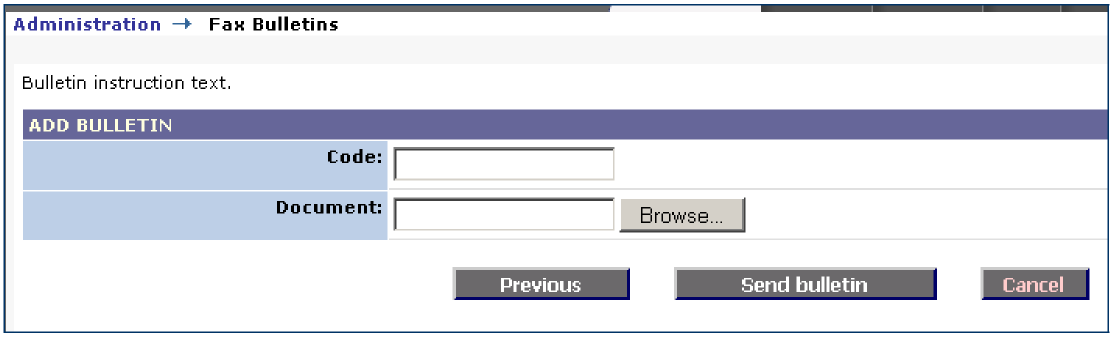
3 Key in the *Additional SQL FROM clause*, if desired. (This is the table name in the database.)

4 Key in the *SQL WHERE clause*. (For example, if you wish to run a particular Trading Partner ID, key in **tp_id = 10294** to target only that Trading Partner with the ID of 10294.)

> For definitions regarding table names and fields used in the database, please refer to the ***dBase_tables.txt*** *Reference Guide*.

5 Click **Next**. The list of Trading Partner(s) matching your WHERE clause is displayed.

6 Click **Next**. The Add Bulletin screen is displayed.



7 Key in the bulletin CODE in the Code open text field.

8 Click **BROWSE** to select and upload the bulletin you have stored on your hard drive.

9 Click **Send bulletin.**

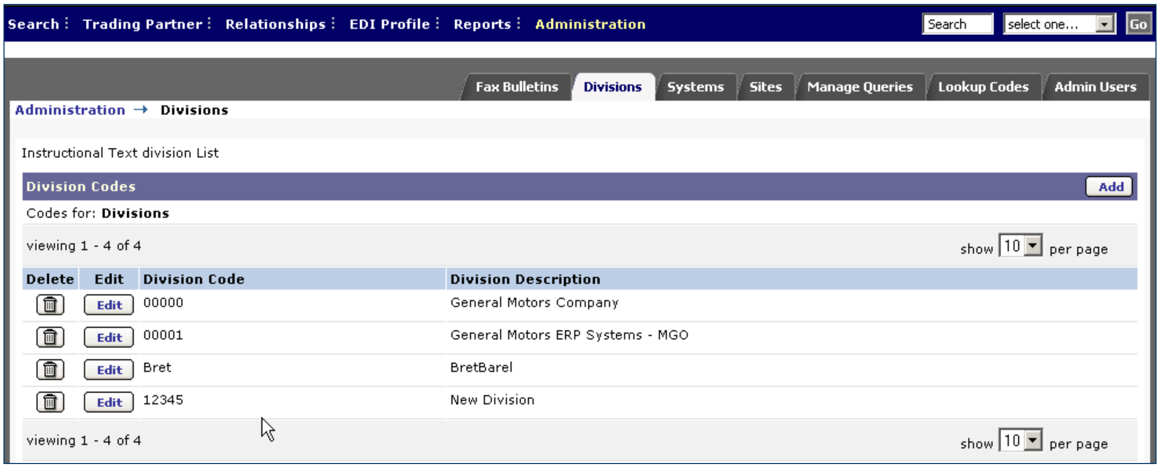
10 Click **Finish.**

RESULT

You have successfully added a bulletin.

Managing Divisions, Systems, and Sites

Users are able to add, edit, and delete divisions, systems, and sites.



1 Click **Administration**.

2 Perform one of the following

If You Wish To...	Then...

Add a division	**a** Click **Divisions** tab. **b** Click **Add** in the Division Codes screen. **c** Key in the *Division Code* in the Division Code open text field. **d** Key in the *Division Description* in the Division Description open text field. **e** Select the *Parent Division Name* from the drop box. **f** Click **Save changes**.
Edit a division	**a** Click **Edit** in the Edit column of the Divisions screen. The Edit a Code screen is displayed. **b** Edit as desired. **c** Click **Save changes**.
Delete a division	**a** Click  in the Delete column of the division you wish to remove. **b** Click **OK** from the confirmation dialog box. The screen is refreshed, and the division is no longer displayed.
Add a system	**a** Click **Systems** tab. **b** Click **Add** in the System Codes screen. **c** Key in the *System Code* in the System Code open text field. **d** Key in the *System Description* in the System Description open text field. **e** Select the *Parent System Name* from the drop box. **f** Click **Save changes**.
Edit a systems	**a** Click **Edit** in the Edit column of the Systems screen. The Edit a Code screen is displayed. **b** Edit as desired. **c** Click **Save changes**.
Delete a system	**d** Click  in the Delete column of the system you wish to remove. **e** Click **OK** from the confirmation dialog box. The screen is refreshed, and the system is no longer displayed.
Add a site	**a** Click **Sites** tab. **b** Click **Add** in the Sites Codes screen. **c** Key in the *Site Code* in the Site Code open text field. **d** Key in the *Site Description* in the Site Description open text field. **e** If desired, key in the *Trading Partner name*. **f** If desired, select the *Division description*. **g** If desired, key in the *General division*. **h** Click **Save changes**.
Edit a site	**a** Click **Edit** in the Edit column of the Site screen. The Edit a Code screen is displayed. **b** Edit as desired. **c** Click **Save changes**.
Delete a site	**a** Click  in the Delete column of the site you wish to remove. **b** Click **OK** from the confirmation dialog box. The screen is refreshed, and the site is no longer displayed.

RESULT
You have successfully managed divisions, systems, and sites.

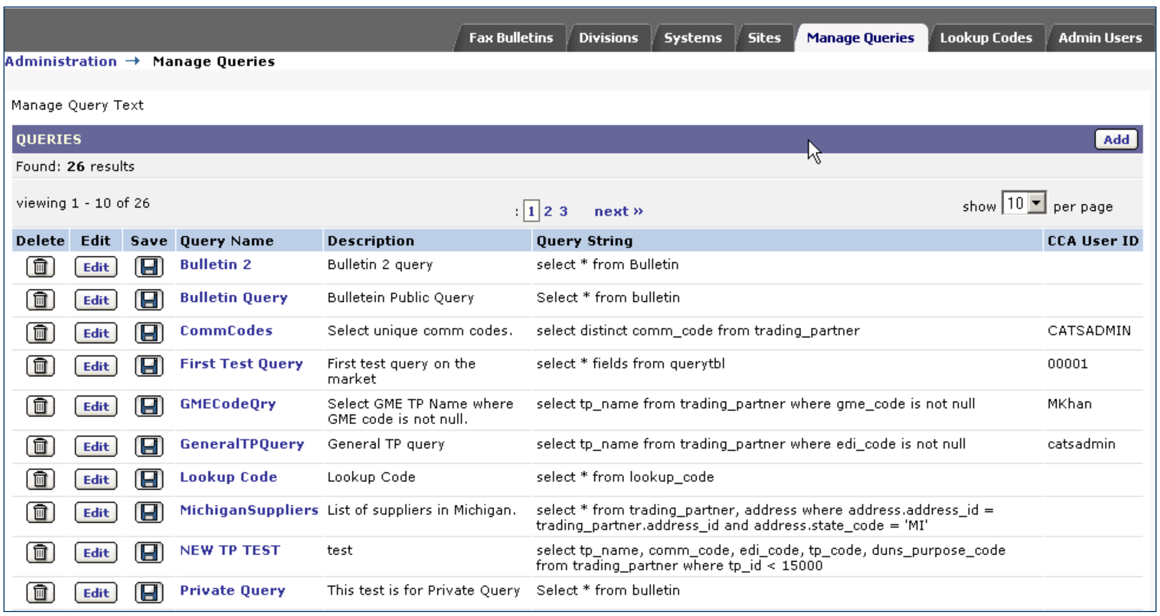
Managing Queries

Administrators are able to manage public and private queries from the Administration menu. Management functionality includes the ability to:

- View queries online
- Export queries as .csv files
- Add new queries
- Edit existing queries
- Delete queries

Complete the following steps to perform query management.

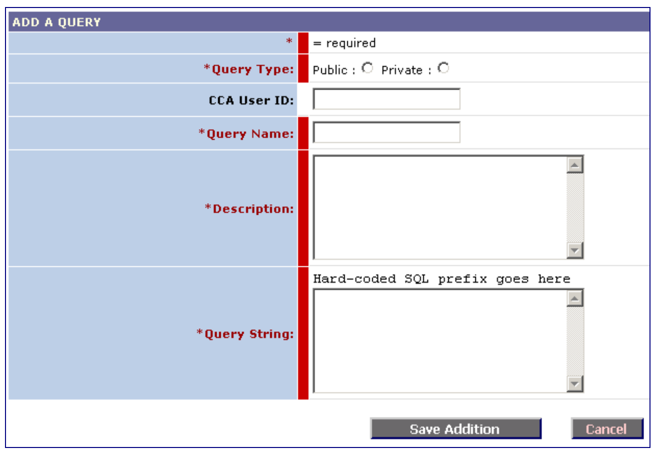
1 Click **Manage Queries** from the Administration menu. The Manage Queries screen is displayed.



Delete	Edit	Save	Query Name	Description	Query String	CCA User ID
	Edit		Bulletin 2	Bulletin 2 query	select * from Bulletin	
	Edit		Bulletin Query	Bulletein Public Query	Select * from bulletin	
	Edit		CommCodes	Select unique comm codes.	select distinct comm_code from trading_partner	CATSADMIN
	Edit		First Test Query	First test query on the market	select * fields from querytbl	00001
	Edit		GMECodeQry	Select GME TP Name where GME code is not null.	select tp_name from trading_partner where gme_code is not null	MKhan
	Edit		GeneralTPQuery	General TP query	select tp_name from trading_partner where edi_code is not null	catsadmin
	Edit		Lookup Code	Lookup Code	select * from lookup_code	
	Edit		MichiganSuppliers	List of suppliers in Michigan.	select * from trading_partner, address where address.address_id = trading_partner.address_id and address.state_code = 'MI'	
	Edit		NEW TP TEST	test	select tp_name, comm_code, edi_code, tp_code, duns_purpose_code from trading_partner where tp_id < 15000	
	Edit		Private Query	This test is for Private Query	Select * from bulletin	

2 Set report filter criteria as desired:

If You Wish To…	**Then…**

<table>
<tr><td>View a query online as HTML</td><td>
a In the Query Name column, click on the name of the query you wish to view.
b Scroll the report via the vertical and/or horizontal scroll bars.
c Click Back to return to the main query page.
</td></tr>
<tr><td>Export a query as a .csv file</td><td>
a In the Query Name column, click on the name of the query you wish to export.
b Click Save as .csv file to export the report.
c Click Save in the File Download pop up box.
d Key in a file name.
e Select the target location where you want the file saved to your hard drive.
f Click Save.
(Note: Click from the main page of the Query tab next to the query you wish to export if you do not wish to generate the query first).
</td></tr>
<tr><td>Add a query</td><td>
a Click Add. The Add a Query is displayed.


b Select either the Public or Private Query Type radio button, depending upon the access rights you wish to give this report.
c If desired, key in your CCA User ID.
d Key in the Query Name.
e Key in the Description of this query.
f Key in the Query String.
g Click Save Addition.
</td></tr>
<tr><td>Edit an query</td><td>
a Click Edit in the Edit column of the query you wish to modify.
b Edit as desired.
c Click Save Addition.
</td></tr>
<tr><td>Delete a query</td><td>
a Click Edit in the Delete column of the query you wish to remove.
b Click OK from the confirmation dialog box to delete the record.
</td></tr>
</table>

RESULT

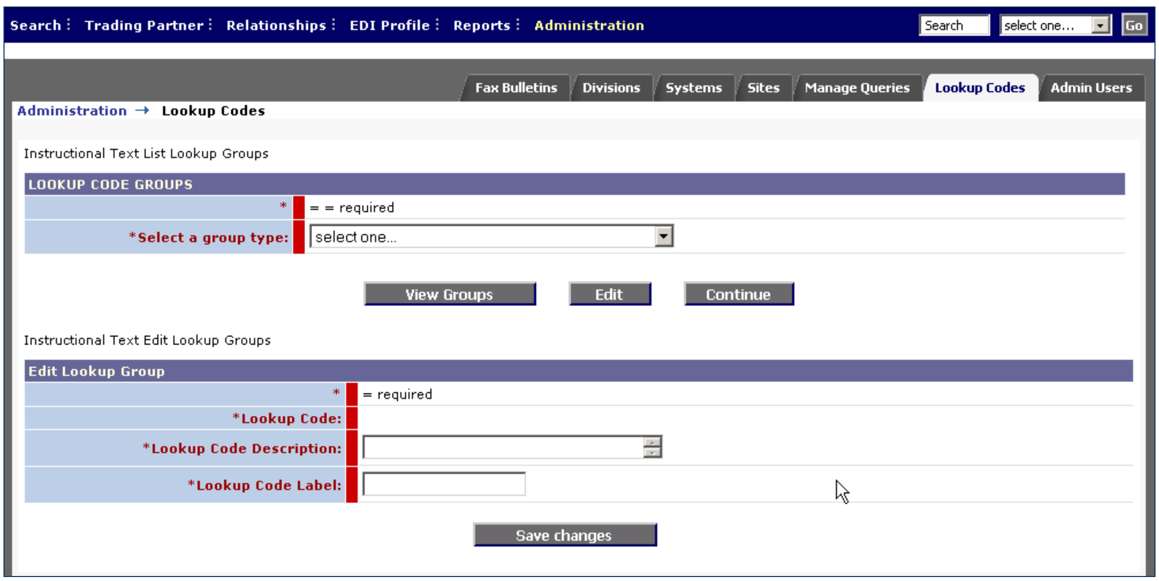
You have successfully managed queries.

Managing Lookup Codes

Administrators are able to manage lookup codes from the Administration menu. Management functionality includes the ability to view, add, edit, and delete lookup codes.

Complete the following steps to perform lookup code management.

1 Click **Lookup Codes** tab from the Administration menu. The Lookup Codes screen is displayed.



2 Set report filter criteria as desired:

If You Wish To…	Then…

View all Lookup Code Groups	Click **View Groups.**
Edit a Lookup Group Type	**a** In the *Select a group type* drop box, highlight and select the group type you wish to edit. **b** Click **Edit.** The Edit Lookup Group fields are populated. **c** Edit the description and code label as you wish. **d** Click **Save changes.**
Add a Lookup Code to a group type	**a** In the Select a group type drop box, highlight and select the group type to which you wish to add a code. **b** Click **Continue.** The Lookup Codes for that group type are displayed. **c** Click **Add.** The Add a Code screen is displayed. **d** Key in the *Lookup Code* in the open text field. **e** Key in the *Lookup Code Description* in the open text field. **f** Key in the *Lookup Code Label* in the open text field. **g** Click **Save Changes**. The screen is refreshed and the new lookup code belonging to that group is displayed.
Delete a Lookup Code	**a** In the *Select a group type* drop box, highlight and select the group type for which you wish to delete a lookup code. **b** Click **Continue.** The Lookup Codes are populated. **c** Click **.** **d** Click **OK** from the confirmation dialog box.

RESULT

You have successfully managed lookup codes.

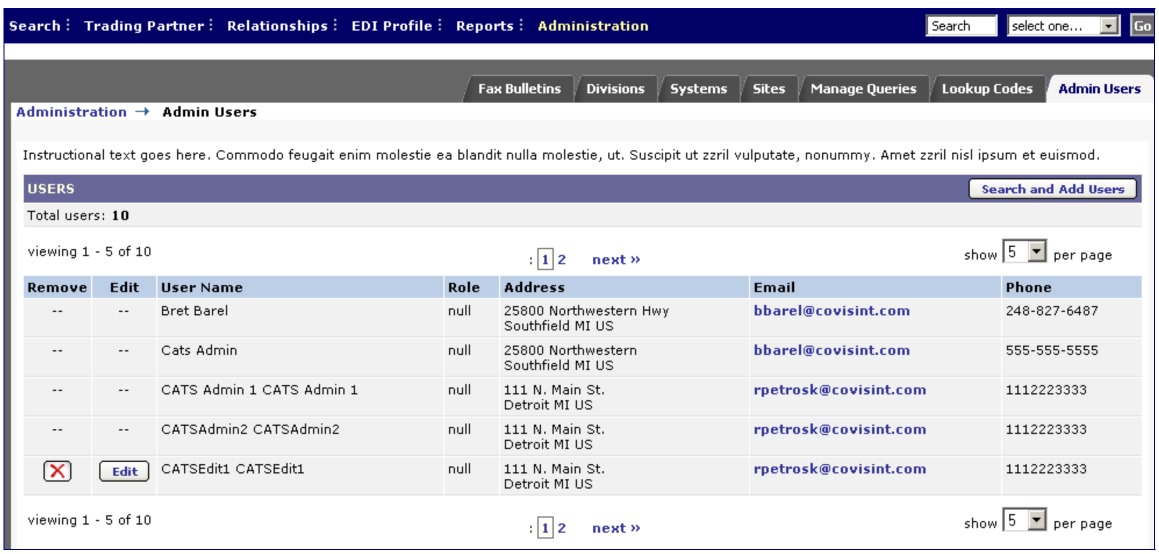
Managing Users

Administrators are able to manage users from the Administration menu. Management functionality of users include; adding new users, editing, and deleting existing users.

> Users must first obtain a Covisint User ID and Password in order to be added to the CATS application.

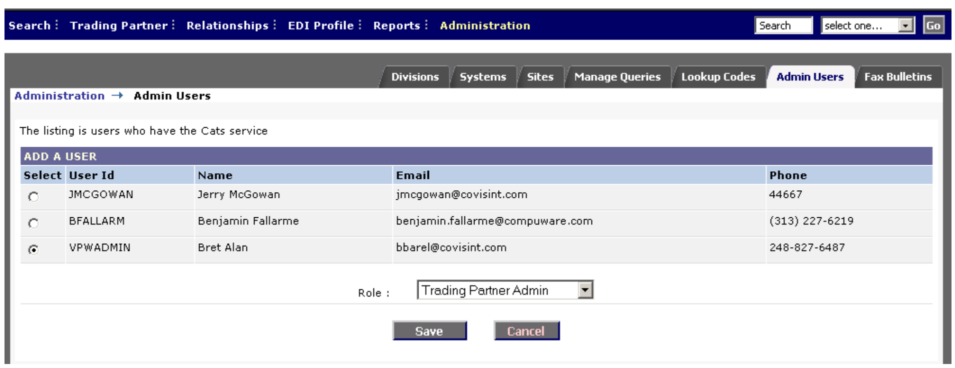
Complete the following steps to perform user management.

1 Click **Admin Users** tab from the Administration menu. The User Admin screen is displayed.



2 Complete one or more of the following:

IF YOU WISH TO...	THEN...

Delete an existing user	Click [X] in the Remove column of the user you wish to delete.
Modify an existing user's role within the CATS application	**a** Click [Edit] in the Edit column of the user for whom you wish to modify its role. **b** In the *CATS Role* drop box, select the new role you wish to assign. **c** Click **Save changes.**
Add a new user to the CATS application and assign a role	**a** Click [Search and Add Users]. The Search User screen is displayed. **b** Key in at least one of the User Search criteria: • the CCA User ID • The User's First Name • The User's Last Name • The User's Email address **c** Click **Search.**  **d** Enable the radio button of the user to whom you wish to assign a cats role. **e** From the Role: drop box, select the role you wish to assign to the identified user. **f** Click **Save**. The screen refreshes and the confirmation message displayed: **The user VPWADMIN saved successfully**

RESULT

You have successfully managed user administration codes.

TOPIC REVIEW

Summary

You have just completed ***MODULE 6.*** You are now able to:

- Fax Bulletins
- Divisions
- Systems
- Sites
- Manage Queries
- Lookup Codes
- Users (excluding granting Admin and Super Admin privileges)

In this module, we have defined the processes and procedures for performing additional administrative tasks.