

Connect Activation and Tracking System (CATS)

Administrator's Guide

August 2004 Product Revision Level 1.0.0

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Connect Activation and Tracking System (CATS) ~ Administrator's Guide



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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)				
1	Important information regarding a topic				
	Definition of a new term the first time it is used				
i	Additional information about the topic				
2345 × 2 5 5 7 3	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:

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- 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:

Таѕк	SUPER Administrator	Administrator	COVISINT HELP DESK	TRADING Partner Basic
Create				
Administrator	X	*	-	-
users Create and				
send fax	x	х	_	_
bulletins	~	~	-	_
Create Super				
Admin users	X	*	-	-
Edit Trading				
Partner	X	Х	X	-
information				
Generate	x	x	x	X
reports	Λ	Λ	Α	^
Manage	74			
documents	X	X	-	-
and messages Manage EDI				
profiles	X	X	-	-
Manage				
lookup codes	X	X	-	-
Manage	N	N.		
master data	X	X	-	-
Manage profile				
users	X	X	-	-
Manage				
queries	X	X	-	-
View				
Administration	X	Х	Х	X
tables				
View any				
Trading	x	x	x	X
Partner	~	~	A	~
information				
View Trading	X	Y	x	X
Partner	X	X	~	~
relationships				

*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 <u>www.covisint.com</u> in your browser's address bar, then click CG 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 2 or press [Enter] on your keyboard.

THE COVISINT PORTAL HOME PAGE DISPLAYS



Connect Activation and Tracking System (CATS) ~ Administrator's Guide

		Help Edit My Profile Language	Search 🔸 Log Ou
Covisint : Connect : Communic	ate 🗄 Collaborate 🗄 Trading Partners 🗄 My Workspace 🏾 🎫		
COVISINT Autority of Constant Welcome, Melanie Abston - Covisint	Covisint Bulletins Train	ning	
My Favorites	Supplier Bulletins		
Yahoo	Status Subject	From	Publish Date
White Pages Hub	Quality Alert Related to Torque Systems All suppliers using torque systems	Delphi Corporation - World Headquarters	04/30/2004
Greater Detroit ASTD CNN	I IMPORTANT NOTICE FOR VISTEON SUPPLIERS: Suppliers to Visteon	Ford Motor Company	04/26/2004
Ann Arbor ASTD ASTD	eAPQP solution update Users of eAPQP	Ford Motor Company	01/20/2004
Covisint Applications			Go to Bulletins
Auction	Auto Beat Daily		
Auction Training	-	Beat Daily - May 06, 2004	
CAS Content Management			
Covisint Content Management		Beat Daily - May 05, 2004	
Crystal Reports Administration	AutoBeat Daily - May 11, 2004 🔀 Auto	Beat Daily - May 04, 2004	
GRID - Covisint Access	🔣 AutoBeat Daily - May 10, 2004 🔀 Auto	oBeat Daily - May 03, 2004	
Library Services	📆 AutoBeat Daily - May 07, 2004 📆 Auto	Beat Daily - April 30, 2004	
Library Services - GSS			more
Problem Solver			
Sourcing Directory	Auto Tech Daily		
Supplier Bulletin	🗖 AutoTech Daily - May 13, 2004 📆 Auto	Tech Daily - May 06, 2004	
Partner Portals			
Ford Supplier Portal		oTech Daily - May 05, 2004	
Administration	AutoTech Daily - May 11, 2004 🔂 Auto	oTech Daily - May 04, 2004	
Administration Tools	🔣 AutoTech Daily - May 10, 2004 📆 Auto	oTech Daily - May 03, 2004	
Change Password	🔣 AutoTech Daily - May 07, 2004 📆 Auto	oTech Daily - April 30, 2004	
Edit My Profile	———————————————————————————————————————		more

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

THE CATS APPLICATION IS DISPLAYED.



Search : Trading Partner : Relationships : EDI Profile : Reports : Adm	Search select one 💌 Go	
Search → Search		Search
Scall / Scall		
Search and select a Trading Partner to work with.		
SEARCH TRADING PARTNER		Add a new Trading Partner
Type of Search: • Begins with • Contains		
Trading Partner I Name:	Customer Code:	
DUNS:	Transmitted ID:	
DUNS Purpose Code: select one	GME Code:	
Comm Code:	Relation To GM: selectone	
EDI Code:	Status: select one	
GRID ID:	TP ID:	
Search	Clear	
Jearth	oicu	

RESULT

You have successfully logged in to the CATS application.



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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

Search : Trading Partner : Relationships	EDI Profile Reports Ac	Iministration		Search select one 🔽 Go
				Search
Search \rightarrow Search				
Search and select a Trading Partner to work w	/ith.			
SEARCH TRADING PARTNER				Add a new Trading Partner
Type of Search: 🖲 Begins with	C Contains			
Trading Partner I		Customer Code:		
DUNS:		Transmitted ID:		
DUNS Purpose Code: select one	•	GME Code:		
Comm Code:		Relation To GM:	select one	
EDI Code:		Status:	select one	
GRID ID:		TP ID:		
	Search	Clear		
	Jearci	Bical		

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.



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Search	: Trading Partner: Relationships: EDI Pr	ofile: Reports: Administration		Search	select one 💌 Go
					Search
Searc	h → Search				Scarch
SEA	RCH TRADING PARTNER RESULTS				
	d: 22 results			Add a new T	rading Partner
viewi	ing 1 - 10 of 22	: 1 2 3 next »	-	sh	ow 10 🔽 per page
New	Name	Location	DUNS	Comm Code	Relationship
	DELPHI A - SPRING HILL SVC	COLUMBIA, TN, US	125837513		Supplier
	DELPHI DIESEL SYSTEMS CORP	TROY, MI, US	183795780	LUH	Supplier
	DELPHI MECHATRONIC SYSTEMS INC	FOLEY, AL, US	128737350	PKD	Supplier
	DELPHI S&I - ORION PLT	ORION TOWNSHIP , MI , US	131640604		Supplier
	DELPHI-D - MCALLEN	MCALLEN , TX , US	147130736		Supplier
	DELPHI-E - FLINT PLT 6 EAST	FLINT , MI , US	186078531		Supplier
	DELPHI-E - ROCHESTER	ROCHESTER , NY , US	199981390		Supplier
	DELPHI-E&C - ANDERSON	ANDERSON, IN, US	155136252		Supplier
	DELPHI-E&C - COOPERSVILLE	COOPERSVILLE , MI , US	109299271		Supplier
	DELPHI-E&C - FLINT WEST	FLINT , MI , US	101567832		Supplier
viewi	ing 1 - 10 of 22	: 1 2 3 next »		sh	ow 10 💌 per page
Foun	d: 22 results			Add a new T	rading Partner

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

Search : Trading Partner : Relations	nips : EDI Profile : Reports : Admir	nistration	Search select one 💌 Go
Search → Results → Trading Partner			Trading Partner Details Contract Profiles
→ CURRENTLY SELECTED TRADING PAR			Find new
Trading Partner DELPHI DIESEL SYSTEMS CORP	Location TROY , MI , US	DUNS Comm Cod 183795780 LUH	
TRADING PARTNER DETAILS			Edit
DUNS:	183795780	DUNS Purpose Code:	Ship from
Customer Code:		Regional Support Center:	NAO
Comm Code:	LUH	EDI Code:	
GME:		Relation To GM:	Supplier
GRID ID:		TP ID:	
Last Feed Update:	2004-04-19 00:00:00.0		
PRIMARY ADDRESS			
Address type:	Primary 🖈	Primary Style 1	Primary Style 2
Primary Name:		DELPHI DIESEL SYSTEMS CORP PO BOX 7079	PO BOX 7079.
Secondary Name:	PO BOX 7079	US TROY, MI 480077079	TROY, MI, US 480077079
Address 1: Address 2:	PO BOX 7079	1801, 11 400077079	400077079
	TROY		
State/Province:			
Country:			
	480077079		

RESULT

You have successfully searched for a trading partner.





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



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arch i	Tradir	ng Partner : Relations	ihips∶EDI Profile∶Re	eports : Admini	istration		Search	select one 💌	
						Tra	ading Partner Details	Contract Profile	
			r → Trading Partner D	etails					
rading P	Partner t compa	BELECTED TRADING PA	Location [DUNS 12121asdasd	Comm abcd1		Relationship Supplier	Find new. Status M	
TRADI	NG PAR	TNER DETAILS						Ed	
			: 12121asdasd		DUN	IS Purpose Code:			
		Customer Code			001	Transmitted ID:			
		Comm Code				EDI Code:	abcd1234		
			abcd1234			Relation To GM:			
		GRID ID				TP ID:	Cappilol		
	Pe	gional Support Center			1 :	ast Feed Update:			
	Ke	gional support center				ast reeu opuate.			
ECON	IDARY A	DDRESS						Ed	
		Address type type	: Secondary		Secondary Style 1		Secondary Style	2	
			rob Test company 2		rob Test company 2		rob Test company 2		
		Secondary Name			abcd1234^#& US		abcd1234^#&.		
		•	: abcd1234^#&		abcd1234^#&, MI abcd1234^#&		abcd1234^#&, MI, US abcd1234^#&		
			: abcd1234^#&						
			: abcd1234^#&						
		State/Province							
		Country							
		· · · · · · · · · · · · · · · · · · ·	: abcd1234^#&						
		Eip	. 00001234 #4						
DNTAC	стя							A	
elete	Edit	Purpose	Name (Last, First	:) Func	tion	Contact	Lan	guage	
1	Edit	EDI CONTACT	qweqwe, qweqwe	: ☆		2134.234.234(pl 234.234.234(fa) 234234			
1	Edit	COMM CONTACT	blow, joe 🖈	just a	і јоб	222.333.4444(p) 2223.333.3333() rpetrosk@cov	fax)	LISH	
1	Edit	COMM CONTACT	blow, joe	just a	јор	222.333.4444(p 2223.333.3333() rpetrosk@cov	fax)	LISH	
Ì	Edit	COMM CONTACT	blow, joe	just a	і јоб	222.333.4444(p 2223.333.3333(rpetrosk@cov	hone) ENG fax)	LISH	
DMMEI	NTS						Add	Show all commer	
omme	ent Type	•	Comment			Author ID	Date		
DI			these are test comments	s 1		CATSEDIT1	2004-0	06-09	
eneral			234324324			CATSEDIT1	2004-0	06-09	

Managing Trading Partner Details

1 Perform one or more of the following:

IF YOU WISH TO... THEN...



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

Search : T	Gearch 🗄 Trading Partner 🗄 Relationships 🗄 EDI Profile 🗧 Reports 🗄 Administration 🛛 🛛 Search 🔹 Select one 💌 🗔						
			The con	tract XYZ123 saved			
					TI ASSESSMENT	rading Partner Details	Contract Profiles
Search \rightarrow	Results	\rightarrow Trading Partner \rightarrow	Contract Profiles				
→ CURREN	TLY SELF	CTED TRADING PARTNE	2				Find new
Trading Par		Loca		DUNS 139468177	Comm Code	Relationship	Status
LEAR SEAT	INGLU	(P RUM	ULUS, MI, US	139468177	LSY	Supplier	0
CONTR	ACT PRO	FILES					Add
viewing	1 - 1 of	1				show 10	▼ per page
Delete	Edit	Contract Name		Due Date		Sta	atus
Î	Edit	XYZ123		06/24/2004		Ē	✓
viewing	1 - 1 of	1				show 10	🕶 per page

- 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
	c Click Save Addition.
Modify an existing	 a Click Edit in the edit column of the profile you wish to modify. b Modify as desired: Contract name
profile contract	<i>Due Date (via the calendar icon) Status (Active, Rejected, Pending)</i>
	c Click Save Addition.
Delete an existing profile	a Click in the delete column of the profile you wish to delete.
contract	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.

			Supplier Relationships	Customer F	Relationship
earch → Results → Relationships					
CURRENTLY SELECTED TRADING P. rading Partner FELPHI A - SPRING HILL S¥C	ARTNER Location COLUMBIA , TN , US	DUNS 125837513	Comm Code	Relationship Supplier	Find new. Status O
SITES THIS SUPPLIER SHIPS-TO			BIUICION		
Site & Description viewing 1 - 4 of 4			DIVISION	show 10 💌 p	er page
17501 - SERVICE PARTS OPERATION			SPO		
18016 - BOWLING GREEN			88835/BFT		
19078 - LORDSTOWN ASSEMBLY PLAN	νT		88835/BFT		
			88835/BFT		



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.





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
 - o 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.

Search 🗄 Ti	rading	g Partner i	Relationships	EDI Profile	Reports :	Administration			Search	select	one 💌 Go
						Supplier Certif	ication Con	nectivity Custo	mer Certifica	tion Ser	vice Providers
Search →	Resu	lts → EDI P	Profile → Supp	lier Certificatio	1						
	TLY SE	ELECTED TR	ADING PARTNER	ł							Find new
Trading Part			<u>_</u>	Location	711 110	DUN		Comm Code		ionship	Status
DELPHIA -	- SPRI	ING HILL SY	L	COLUMBIA	, IN, US	125	837513		Supp	ller	0
System is s	still un	der developn	nent								
MESSAGE	PROF	FILE FOR SU	PPLIERS								Add
Found: 0 r	results										
no records	s										
			Std. Format								
Delete E		iystem Code	Message Type Version	Transaction Set	Due Date	Scheduled Test Date	Start Test Date	Approval Date	Cutover Date	Statu	s Required?
no records	s										
Found: 0 r	results										
COMME	NTS								Add	Show all	comments
Comme					_		_		Add	Show an	commente
Туре	ent	Comment	:							Author ID	Date
EDI		SPO-Sent Latta to ca		ne for Raj Sivakur	nar to retu	rn my call to get duns	setup on EDI.	Also left a messag	e for Phil	rgoenka	2004-04-30
EDI		SPO-Recei	ved signed cutove	er letter back from	n Raj Sivak	umar duns will cutove	r on 3/13/04 u	inder comm code D	PH.	rgoenka	2004-04-30
EDI		SPO-Left v	me for Phil Latta I	to return my call t	o setup du	ns on EDI.				rgoenka	2004-04-30
EDI		SPO-Left a	nother vme for Pl	nil Latta to return	my call to (get duns setup on EDI				rgoenka	2004-04-30
EDI						ts EDI for this duns. In a response back.	formed Raj I	have left numerous	5	rgoenka	2004-04-30

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 <i>Recording Comments to a Trading Partner Record</i> .



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.

		Supplier Certification	Connectivity	Customer Certification	Service Providers
Search \rightarrow Results \rightarrow EDI Profile \rightarrow	Supplier Certification				
→ CURRENTLY SELECTED TRADING PAP					Find new
Trading Partner DELPHI A - SPRING HILL SVC	Location COLUMBIA , TN , I	DUNS US 125837513	COMM 3	Code Relationshi Supplier	p Status O
SUPPLIER MESSAGE PROFILES					
MESSAGE PROFILE					
*	= required				
*System Code:	select one				
Standard Format:	select one				
Message Type:	select one 💌				
Message Version:	select one 💌				
Due Date:					
Scheduled Test Date:					
Start Test Date:					
Approval Date:		k ₽			
Cutover Date:					
Status:	select one 💌				
*Required?	select one 💌				
Document Attributes:					
		Save Cancel			

- **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.

*	= required
*System Code:	MG0 Application
Std. Format:	FLATFILE 💌
Message Type:	810 💌
Version:	√2040 ▼
Due Date:	
Scheduled Test Date:	
Start Test Date:	
Approval Date:	
Cutover Date:	
Status:	select one 💌
*Required?	Mandatory 💌
	Save Addition Cancel

- **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.

		Supplier Certification	Connectivity	Customer Certification	Service Providers
Search \rightarrow Results \rightarrow EDI Profile \rightarrow	Supplier Certification				
→ CURRENTLY SELECTED TRADING PA	RTNER				Find new
Trading Partner DELPHI A - SPRING HILL SVC	Location COLUMBIA , TN , US	DUNS 125837513	Comm	Code Relationship Supplier	o Status O
ADD A COMMENT					
*	= required				
*Comment Type:	EDI Supplier				
*Comment:			×		
	Save commen	tCancel	1		

- **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.



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.

earch : Trading Partner : Relationships : EDI Profile : Reports : Administration							elect one 💌 Go
		_	_	_	_	_	
		Supplier Ce	rtification /	Connectivity	Customer Cer	tification	Service Providers
Search \rightarrow Results \rightarrow EDI Profile \rightarrow Customer Certifica	ation						
→ CURRENTLY SELECTED TRADING PARTNER							Find new
Trading Partner STREIT MECANIQUE GENERALE SA	Location CLERVAL , FR		INS 9021265	COMM		elationship ustomer	Status N
CUSTOMER MESSAGE PROFILES							Add
Found: 0 results							
no records							
Standard Format System Message Type Transaction Delete Edit Code Message Version Set	n Schedule Type		Start Test Date	Last Test Date	Approval Date	Gi Status Re	uidelines eceived?
no records							
Found: 0 results							
COMMENTS					(Add She	ow all comments
Comment Type	Comment		Aut	hor ID		Dat	te

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 <i>Deleting Message Profiles</i> .
Record a comment to a Trading Partner record	Proceed to the section entitled <i>Recording Comments to a Trading Partner Record</i> .



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.

		Supplier Certification	Connectivity	Customer Certification	Service Providers
Search \rightarrow Results \rightarrow EDI Profile \rightarrow	Customer Certification				
→ CURRENTLY SELECTED TRADING PA	RTNER				Find new
Trading Partner STREIT MECANIQUE GENERALE SA	Location CLERVAL , FR	DUNS 279021265	COMM	Code Relationship Customer	Status N
STREET HECHNIQUE GENERALE SA	CLERTAL, TR	279021205		customer	
MESSAGE PROFILE					
*	= required				
*System Code:	select one				
Standard Format:					
Message Type:					
Message Version:					
Start Test Date:					
Last Test Date:					
Approval Date:					
Schedule Type:	select one 💌				
Day of Week:	select one 💌				
Status:	select one 💌				
*Guidelines Received?	select one 💌				
Document Attributes:					
	Save	Cancel			

- **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.

						Supplier Cer	tification 🖡 C	onnectivity	Customer Cert	ification	Service Providers
			Profile → Custome	r Certification							
Trading Pa	rtner	ELECTED TR QUE GENER	ADING PARTNER		ation ERVAL , FR	DU 279	NS 9021265	СОММ		alationship Istomer	Find new Status N
CUSTOME	R MES	SAGE PROF	ILES								Add
Found: 1	results										
viewing 1	- 1 of 1									show	10 💌 per page
Delete		System Code	Standard Format Message Type Message Version	Transaction	Schedule Type	Day of Week	Start Test Date	Last Test Date	Approval Date		Guidelines Received?
	Edit	000	dc ×12 1	dc							No
viewing 1	- 1 of 1									show	10 💌 per page
Found: 1	results										
COMMEN	TS								ſ	Add S	how all comments
Commer	t Tyne	,		Com	ment		Auth	or ID			ate

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.

		Supplier Certification	Connectivity	Customer Certification	Service Providers
Search \rightarrow Results \rightarrow EDI Profile \rightarrow	Customer Certification				
→ CURRENTLY SELECTED TRADING PAP					Find new
Trading Partner STREIT MECANIQUE GENERALE SA	Location CLERVAL , FR	DUNS 279021265	COMM	Code Relationship Customer	Status N
	,			Customer	
MESSAGE PROFILE					
*	= required				
*System Code:	General Motors Company 💌				
Standard Format:	x12				
Message Type:	dc				
Message Version:	1				
Start Test Date:					
Last Test Date:					
Approval Date:					
Schedule Type:	select one 💌				
Day of Week:	select one 💌				
Status:	select one 💌				
*Guidelines Received?	No				
Document Attributes:	a				
	Save	Cancel			

- **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.

Search : Trading Partner : Relations	Search	elect one 💌 Go				
			Supplier Certification	Connectivity Cust	tomer Certification	Service Providers
$Search \to Results \to EDI \ Profile \to$	Customer Certificat	ion				
→ CURRENTLY SELECTED TRADING PA	RTNER					Find new
Trading Partner STREIT MECANIQUE GENERALE SA		Location CLERVAL , FR	DUNS 279021265	COMM Code	Relationship Customer	Status N
ADD A COMMENT						
*	= required					
*Comment Type:	EDI Customer					
*Comment:				×		
Add this comment to every Trading Partner with the above Comm Code:						
		Save comment	Cancel	I		

- **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.



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.

Search : Trading Partner : Relationships : EDI	Search	select one 💌 Go					
👔 You have successfully edited a Channel.							
		Supplier Certif	ication Connectivity	Customer Certification	Service Providers		
Search \rightarrow Results \rightarrow EDI Profile \rightarrow Connectivit	y						
→ CURRENTLY SELECTED TRADING PARTNER				- 1.1	Find new		
Trading Partner Location DELPHI D - FLINT FLINT, MI, U	IS	DUNS 005732581	Comm Code	Relationship Supplier	Status O		
Instructional Text goes here							
· · · · · · · · · · · · · · · · · · ·							
MAILBOXES					Add		
Delete Edit Connect As	VAN	MailBox	Qualifier	Comm Code			
Edit Supplier		НТТР		1234	ſ		
·							
DIRECT LINKS					Add		
Delete Edit Connect As	Channel Type		Net Address	Odette I	8		
Edit Supplier	FTP		10.66.1.21	a123			

4 Perform one or more of the following:

IF YOU WISH TO	THEN
	Durana d to the costion ontitled Adding a Mailbour
Add a Mailbox	Proceed to the section entitled <i>Adding a Mailbox</i> .
Edit a Mailbox	Proceed to the section entitled <i>Editing a Mailbox</i> .
Delete a Mailbox	Proceed to the section entitled <i>Deleting a Mailbox</i> .
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.

Search : Trading Partner : Relationships : EDI	Profile : Repo	orts : Administration		Search	select one 💌 Go			
🚯 You have successfully edited a Channel.								
				(
Consulta - A CDY Duefile - A Consecutivi		Supplier Certif	ication Connectivity	Customer Certification	Service Providers			
Search \rightarrow Results \rightarrow EDI Profile \rightarrow Connectivi \rightarrow CURRENTLY SELECTED TRADING PARTNER	ιy				Find new			
Trading Partner Location		DUNS	Comm Code	Relationship	Status			
DELPHI D - FLINT FLINT, MI,	US	005732581		Supplier	0			
Instructional Text goes here								
MAILBOXES					Add			
Delete Edit Connect As	VAN	MailBox	Qualifier	Comm Code				
Edit Supplier		нттр		1234				
DIRECT LINKS					Add			
Delete Edit Connect As	Channel Type		Net Address	Odette I	d			
Edit Supplier	FTP		10.66.1.21	a123				

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

Search \rightarrow Results \rightarrow EDI Profile \rightarrow Connectivity									
+ CURRENTLY SELECTED TRADING PARTNER Find new									
Trading Partner DELPHI DIESEL SYSTEMS CORP	Location TROY , MI , US	DUNS 183795780	Comm Code LUH	Relationship Supplier	Status O				
Instructional Text goes here									
ADD A MAILBOX CONNECTION									
*	= required								
Channel Type:	MailBox								
*Connect As:	Supplier								
VAN:									
MailBox:									
Qualifier:	select one 💌								
Comm Code:									
	Save Addition	Cancel							

- 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.

Search : Trading Partner : Relat	tionships : EDI Profile : Repo	orts : Administration		Search	select one 💌 Go
	📵 You ha	ave successfully edited a	Channel.		
		Supplier Certifi	cation Connectivity	Customer Certification	Service Providers
Search \rightarrow Results \rightarrow EDI Profile					
→ CURRENTLY SELECTED TRADING Trading Partner	G PARTNER Location	DUNS	Comm Code	Relationship	Find new Status
DELPHI D - FLINT	FLINT , MI , US	005732581	comm code	Supplier	0
Instructional Text goes here					
MAILBOXES					Add
Delete Edit Connect As	VAN	MailBox	Qualifier	Comm Code	
💼 Edit Supplier		нттр		1234	
DIRECT LINKS					
Delete Edit Connect As	Channel Type		Net Address	Odette I	d
Edit Supplier	FTP		10.66.1.21	a123	

- 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.

Search : Trading Partner : Relationships : El)I Profile: Reg	ports : Administration		Search	select one 💌 Go
	📵 You l	have successfully edite	d a Channel.		
	_			_	_
		Supplier Cer	tification Connectivity	Customer Certification	Service Providers
Search \rightarrow Results \rightarrow EDI Profile \rightarrow Connection	vity				
→ CURRENTLY SELECTED TRADING PARTNER					Find new
Trading Partner Location DELPHI D - FLINT FLINT, MI	116	DUNS 005732581	Comm Code	Relationship Supplier	Status 0
	, 03	003732301		Supplier	0
Instructional Text goes here					
MAILBOXES					Add
Delete Edit Connect As	VAN	MailBox	Qualifier	Comm Code	
Edit Supplier		НТТР		1234	
DIRECT LINKS					Add
Delete Edit Connect As	Channel Typ	e	Net Address	Odette I	
Edit Supplier	FTP		10.66.1.21	a123	

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.

*	= required
Channel Type:	MailBox
*Connect As:	Supplier
VAN:	
MailBox:	HTTP
Qualifier:	select one 💌
Comm Code:	1234
	Save Addition Cancel

- **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. 38



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.

Profile : Repo	orts : Administration		Search	select one 💌 Go
📵 You ha	ave successfully edited	a Channel.		
				_
	Supplier Certif	ication Connectivity Cu	istomer Certification	Service Providers
ty				
				Find new
us		Comm Code		Status 0
				Add
VAN	MailBox	Qualifier	Comm Code	
	НТТР		1234	
				Add
Channel Type		Net Address	Odette I	d
FTP		10.66.1.21	a123	
	You have a second se	Supplier Certil ty US DUNS 005732581 VAN MailBox HTTP Channel Type	You have successfully edited a Channel. Supplier Certification Connectivity Cu ty US DUNS Comm Code VAN MailBox Qualifier HTTP Channel Type Net Address	You have successfully edited a Channel. Supplier Certification Connectivity Customer Certification ty US DUNS Comm Code Relationship Supplier YAN MailBox Qualifier Comm Code HTTP Qualifier Comm Code Channel Type Net Address Odette I

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

ADD A DIRECT CONNECTION	
*	= required
*Channel Type:	FTP 🔽
*Connect As:	Customer
Net Address:	
Odette Id:	I
	Save Addition Cancel

- 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.

		🚹 You h	ave successfully edited	d a Channel.		
			Supplier Cer	tification Connectivity	Customer Certificat	ion Service Provider
Search \rightarrow Results \rightarrow EDI P	rofile → Connectivity	•				
CURRENTLY SELECTED TRACE						Find new
Trading Partner DELPHI D - FLINT	Location FLINT , MI , U	P	DUNS 005732581	Comm Code	Relationship Supplier	Status O
	i cinti j fili j di		000702001		Sappiler	0
Instructional Text goes here						
MAILBOXES						Ado
Delete Edit Connect As		VAN	MailBox	Qualifier	Comm Code	
			11770		1234	
💼 Edit Supplier			HTTP			
Edit Supplier			нир		1204	
			нир		1204	
DIRECT LINKS			нпр	_	1204	Ado
	C	hannel Type		Net Address		Ado

- 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.

Search : Trading Partner : Relationships : EDI	Profile : Repo	orts : Administration		Search	select one 💌 Go
	📵 You ha	ave successfully edited a	a Channel.		
	_				
		Supplier Certif	ication Connectivity	Customer Certification	Service Providers
Search \rightarrow Results \rightarrow EDI Profile \rightarrow Connectivit	ty				
→ CURRENTLY SELECTED TRADING PARTNER					Find new
Trading Partner Location		DUNS	Comm Code	Relationship	Status
DELPHI D - FLINT FLINT, MI, U	JS	005732581		Supplier	0
Instructional Text goes here					
MAILBOXES					Add
Delete Edit Connect As	VAN	MailBox	Qualifier	Comm Code	
Edit Supplier		НТТР		1234	
DIRECT LINKS					Add
Delete Edit Connect As	Channel Type		Net Address	Odette I	d
Edit Supplier	FTP		10.66.1.21	a123	

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.

*	= required
Channel Type:	FTP
*Connect As:	Supplier
Net Address:	10.66.1.21
Odette Id:	a123
	Save Addition Cancel

- **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.





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	
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.

Search	Trading Partner	Relationships ED	I Profile : Reports : Administration Search	select one 💌 Go
Reports	s → Public Query		Public Query Private Query Weekly	Variance Fax Activity
Public F	Report Text goes here	•		
PUBLI	C REPORTS			Add
Save	Report Name	Description	Query String	Change Parameters
Found	9 results			
viewin	g 1 - 5 of 9		: 1 2 next » sho	ow 5 💌 per page
	Bulletin Query	Bulletein Public Query	Select * from bulletin	
	Lookup Code	Lookup Code	select * from lookup_code	
	MichiganSuppliers	List of suppliers in Michigan.	select * from trading_partner, address where address.address_id = trading_partner.address_id and address.state_code = 'MI'	
	NEW TP TEST	test	select tp_name, comm_code, edi_code, tp_code, duns_purpose_code from trading_partne where tp_id < 15000	er
	Private Query	This test is for Private	Select * from bulletin	

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:
i	 Public Query reports are <u>available for EVERYONE</u> to generate as either html display on the screen or csv file download. Private Query reports are <u>private to each user</u>, generated as either html display on the screen or csv file donwload.

2 Set report filter criteria as desired:

IF YOU WISH TO

THEN....



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View a query	a In the Report Name column, click on the <i>name of the report</i> you wish to view.			
report online as	b Scroll the report via the vertical and/or horizontal scroll bars.			
	c Click Back to return to the main query page.			
	a In the Report Name column, click on the <i>name of the report</i>			
	you wish to export.			
	b Click Save as .csv file to export the report.			
	c Click Save in the File Download pop up box.			
Export a query	d Key in a file name.			
report as a .csv file	 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).			
	a Click Add. The Add a Query is displayed.			
	ADD A QUERY			
	* = required *Query Type: Public : O Private : O			
	CCA User ID:			
	*Query Name:			
	*Description:			
	×			
	Hard-coded SQL prefix goes here			
	*Query String:			
Add a query	Save Addition Cancel			
	b Select either the Public or Private <i>Query Type</i> 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 <i>Query Name</i> .			
	e Key in the <i>Description</i> of this query.			
	f Key in the <i>Query String</i> .			
	g Click Save Addition.			

RESULT

You have successfully generated a query report.



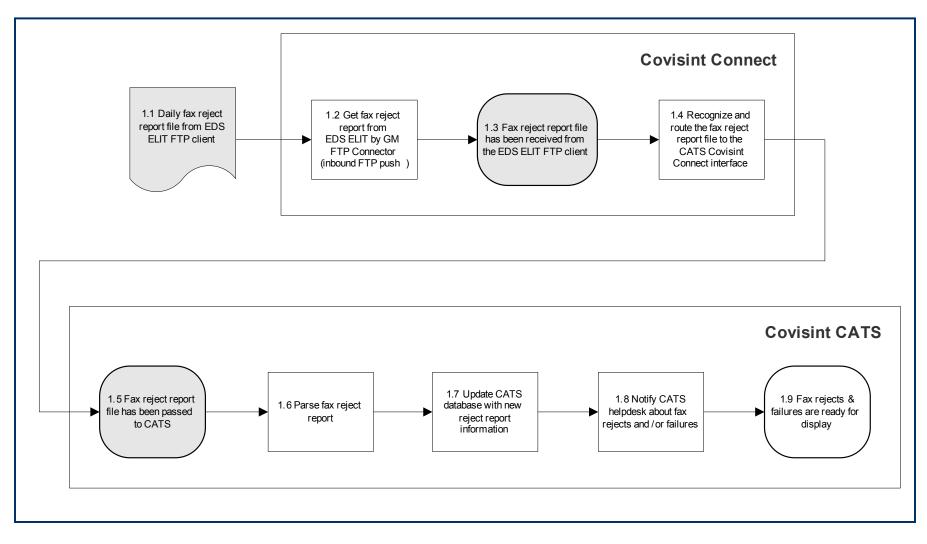
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Generating Fax Activity Reports

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	а	Click on the date in the <i>Report Date</i> column. The report is generated and displayed in HTML format.
activity report online for a date displayed	b	Scroll via the vertical and horizontal scroll bars as necessary to view the report.
uispiayeu	С	Click Back to go back to the main report screen.
	а	Click 🕒 in the row of the report you wish to save. The report is generated in .txt format.
Export a fax	b	Click Save on the File Download pop-up box.
activity report as a .txt file	С	Key in a <i>filename</i> 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	а	Click 🋄 in the Select a Date field.
activity report for a date not currently	b	Select the date for which you wish to view fax activity from the pop-up calendar.
displayed	С	Click View Report . The report is displayed.

RESULT

You have successfully generated a fax activity report.





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.

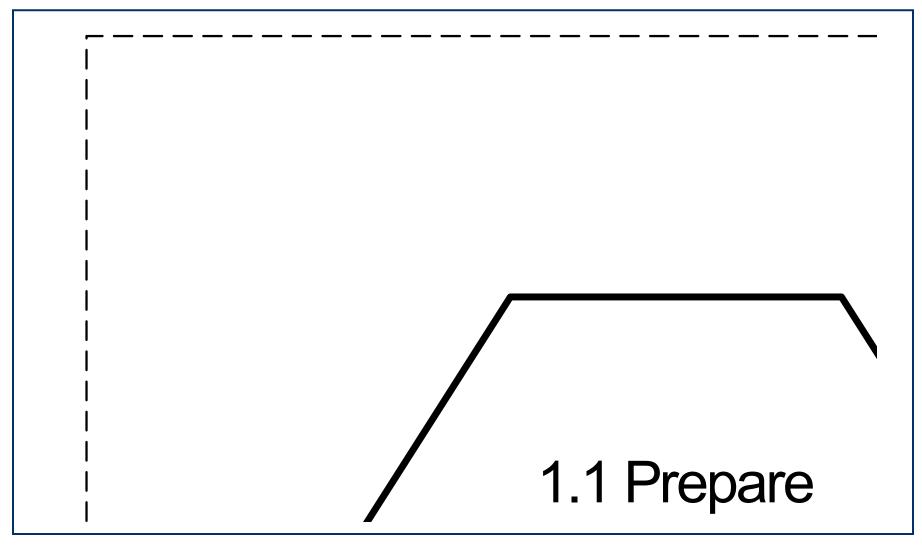
Adding Fax Bulletins

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.

Search: Trading Partner: Relationships: EDI Prof	ile: Reports: Administration		Search select one 💌 Go
	Divisions Systems Sites Mana	nage Queries 🛛 Lookup Codes	s Admin Users Fax Bulletins
Administration → Fax Bulletins			
This screen is for entering the criteria			
ADD BULLETIN			
Base SQL FROM clause:	TRADING_PARTNER TP		
Additional SQL FROM clause (optional for doing joins):		A	
SQL WHERE clause:		×	
	Next Cancel		

- **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.



Administration → Fax Bulletins		
Bulletin instruction text.		
ADD BULLETIN		
Code:		
Document:	Browse	
	Previous Send bulletin Cane	cel

- **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.

Search: Trading Partner: Relationships: EDI Profile:	Reports : Administration	Search select one 💌 Go
	Fax Bulletins Divisions Systems Sites Manage Queries	Lookup Codes Admin Users
Administration → Divisions		
Instructional Text division List		
Division Codes		Add
Codes for: Divisions		
viewing 1 - 4 of 4		show 10 💌 per page
Delete Edit Division Code	Division Description	
Edit 00000	General Motors Company	
Edit 00001	General Motors ERP Systems - MGO	
Edit Bret	BretBarel	
Edit 12345	New Division	
viewing 1 - 4 of 4		show 10 💌 per page

- **1** Click **Administration**.
- 2 Perform one of the following

IF YOU WISH To...

THEN...



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	а	Click Divisions tab.
	b	Click Add in the Division Codes screen.
	c	Key in the <i>Division Code</i> in the Division Code open text field.
Add a	d	Key in the <i>Division Description</i> in the Division Description open
division	-	text field.
	е	Select the Parent Division Name from the drop box.
	f	Click Save changes.
	а	Click Edit in the Edit column of the Divisions screen. The Edit a Code screen is displayed.
Edit a division	ь	Edit as desired.
	c	Click Save changes.
	-	
Delete a	а	Click I in the Delete column of the division you wish to
division	ь	remove. Click OK from the confirmation dialog box. The screen is
	U	refreshed, and the division is no longer displayed.
	а	Click Systems tab.
	b	Click Add in the System Codes screen.
	с	Key in the System Code in the System Code open text field.
Add a system	d	Key in the <i>System Description</i> in the System Description open text field.
	е	Select the Parent System Name from the drop box.
	f	Click Save changes .
	а	Click Edit in the Edit column of the Systems screen. The Edit a
Edit a		Code screen is displayed.
systems	b	Edit as desired.
	С	Click Save changes.
	d	Click 🔟 in the Delete column of the system you wish to
Delete a		remove.
system	e	Click OK from the confirmation dialog box. The screen is refreshed, and the system is no longer displayed.
	а	Click Sites tab.
	b	Click Add in the Sites Codes screen.
	С	Key in the Site Code in the Site Code open text field.
Add a site	d	Key in the <i>Site Description</i> in the Site Description open text field.
	е	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 .
	а	Click Edit in the Edit column of the Site screen. The Edit a Code screen is displayed.
Edit a site	b	Edit as desired.
	с	Click Save changes.
	а	Click in the Delete column of the site you wish to remove.
Delete a site		Conce to the Delega country of the site you wish to remove.
	, מ	refreshed, and the site is no longer displayed.
		, J



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.

				Fax Bulle	etins Divisions Systems Sites Manage Queries Lookup Codes	Admin Users
Administ	ration	→ Ma	nage Queries			
Manage	Query Te	ext				
QUERIE	s				Ν	Add
Found: 3	26 result	ts				
viewing	1 - 10 o	f 26		:[1 2 3 next » show 10	🕶 per page
Delete	Edit	Save	Query Name	Description	Query String	CCA User ID
	Edit	B	Bulletin 2	Bulletin 2 query	select * from Bulletin	
	Edit		Bulletin Query	Bulletein Public Query	Select * from bulletin	
D	Edit		CommCodes	Select unique comm codes.	select distinct comm_code from trading_partner	CATSADMIN
ì	Edit		First Test Query	First test query on the market	select * fields from querytbl	00001
Ē	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	B	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	
Î	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'	
Ē	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...



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	a In the Query Name column, click on the <i>name of the query</i>					
View a query	you wish to view.					
online as HTML	b Scroll the report via the vertical and/or horizontal scroll bars.					
	c Click Back to return to the main query page.					
	a In the Query Name column, click on the <i>name of the query</i>					
	you wish to export.					
	b Click Save as .csv file to export the report.					
	c Click Save in the File Download pop up box.					
Export a query	d Key in a file name.					
as a .csv file	 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).					
	a Click Add. The Add a Query is displayed.					
	ADD A QUERY					
	*Query Type: Private : O					
	CCA User ID: *Query Name:					
	*Description:					
	Hard-coded SQL prefix goes here					
	*Query String:					
Add a query	The second s					
	Save Addition Cancel					
	b Select either the Public or Private <i>Query Type</i> 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 <i>Query Name</i> .					
	e Key in the <i>Description</i> of this query.					
	f Key in the <i>Query String</i> .					
	g Click Save Addition.					
	a Click Edit in the Edit column of the query you wish to modify.					
Edit an query	b Edit as desired.					
	c Click Save Addition.					
	a Click Edit in the Delete column of the query you wish to					
Delete a query	remove.					
	b Click OK from the confirmation dialog box to delete the record.					
	59 59					



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.

Search : Trading Partner : Relationships : EDI Profile : Reports : Administration	Search selec	tone 💽 Go
Fax Bulletins Divisions Systems Sites Manage Queries	Lookup Codes	Admin Users
Administration → Lookup Codes		_
Instructional Text List Lookup Groups		
LOOKUP CODE GROUPS		
* = = required		
*Select a group type: select one		
View Groups Edit Continue		
Edit Lookup Group		
* = required		
*Lookup Code: *Lookup Code Description:		
*Lookup Code Label:		
Save changes		

2 Set report filter criteria as desired:

IF YOU WISH TO THEN	
---------------------	--



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

			Fa	x Bulletins Divisions Systems	Sites Manage Queries Loo	kup Codes Admin Use
ministra	ation \rightarrow	Admin Users				
struction	al text o	oes here. Commodo feugait enim mol	ectie ea bland	it pulla molectie, ut Succipit ut zzril	vulputate popummy Ametizzril pi	l insum et euismod
	artextig	bes here. Commodo reagait enim mon	esce ea bialio	it halla molestie, at. Sascipit at 22m	rvalpatate, nonannny. Amet zzni ni:	
ISERS						Search and Add Users
otal user	s: 10					
iewing 1	- 5 of 10	1		: 1 2 next »		show 5 💌 per page
lemove	Edit	User Name	Role	Address	Email	Phone
		Bret Barel	null	25800 Northwestern Hwy Southfield MI US	bbarel@covisint.com	248-827-6487
		Cats Admin	null	25800 Northwestern Southfield MI US	bbarel@covisint.com	555-555-5555
		CATS Admin 1 CATS Admin 1	null	111 N. Main St. Detroit MI US	rpetrosk@covisint.com	1112223333
		CATSAdmin2 CATSAdmin2	null	111 N. Main St. Detroit MI US	rpetrosk@covisint.com	1112223333
		CATSEdit1 CATSEdit1	null	111 N. Main St.	rpetrosk@covisint.com	1112223333

2 Complete one or more of the following:

IF YOU WISH TO...

THEN...



Delete an existing user	Click \fbox 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 <i>CATS Role</i> drop box, select the new role you wish to assign. c Click Save changes.
	 a Click Search and Add Users 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 Click Search.
Add a new user to the CATS application and assign a role	Search: Trading Partner: Relationships: EDI Profile: Reports: Administration Search: Search: Cookup Codes Administration Image: Cookup Codes Administration Administration → Admin Users The listing is users who have the Cats service Image: Cookup Codes Administration Image: Cookup Codes Administration Select User Image: Cookup Codes Administration Image: Cookup Codes Administration Select User Image: Cookup Codes Administration Image: Cookup Codes Administration Select User Image: Cookup Codes Administration Image: Cookup Codes Administration Select User Image: Concest Image: Concest Image: Concest Image: Concest Image: Concest Image: Concest Image: Concest Concest Concest Image: Concest Image: Concest Image: Concest Concest Concest Image: Concest Image: Concest C

RESULT

You have successfully managed user administration codes.





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.