covisint
a subsidiary of Compuware Corporation

Connect
GM Advance Carbon Copy
~ *Plant Administrator Guide*

June 2006

☑ INTRODUCTION

About this Guide

The purpose of this guide is to direct the Plant Administrator users through the functionality of Advance Carbon Copy. 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:

- Manage Carbon Copy Users
- Manage CISCO Codes
- Create Inbound Carbon Copy Rules
- Manage Inbound Carbon Copy Rules
- Create Outbound Carbon Copy Rules
- Manage Outbound Carbon Copy Rules

Target Audience

The target audience includes:

- GM-Designated Advance Carbon Copy Plant Administrators

Prerequisites

- Obtained a Covisint User ID and Password
- Your company has completed the Covisint Connect Enablement Wizard
- Your Security Administrator has granted your request to access Connect
- You belong to a Trading Partner Profile in Connect
- You have been granted the role of Advance Carbon Copy Plant Administrator

> A COVISINT CONNECT USER'S GUIDE IS AVAILABLE ONLINE AT:
>
> **HTTPS://PORTAL.COVISINT.COM/PORTAL/PUBLIC/SUPPORT/TRAINING**
>
> CLICK THE COVISINT CONNECT LINK ON THAT PAGE.

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
	WARNING MESSAGE
	AN EXAMPLE, SHORTCUT, OR TIP
	SUMMARY OR TOPIC REVIEW OF KEY CONCEPTS
	TRANSITION TO INDICATE THE END OF A MODULE.
	EXERCISES AND PROGRESS CHECKS
	A PAGE WHERE YOU CAN WRITE YOUR OWN NOTES/COMMENTS

☑ MODULE 1: MANAGING CARBON COPY USERS

About this Module

The purpose of this module is to direct the Plant Administrator through the functionality of managing users within Advance Carbon Copy. In order for users to be available within Advanced Carbon Copy functionality, users must already belong to a profile in the Covisint Connect application in order to be added to Advanced Carbon Copy.

Module Objectives

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

- Add Carbon Copy Users
- Add CISCO Codes
- Delete Carbon Copy Users
- Delete CISCO Codes

There are three User Roles within the Advanced Carbon Copy functionality, and are defined below. This User Guide is provided for the Plant Administrator.

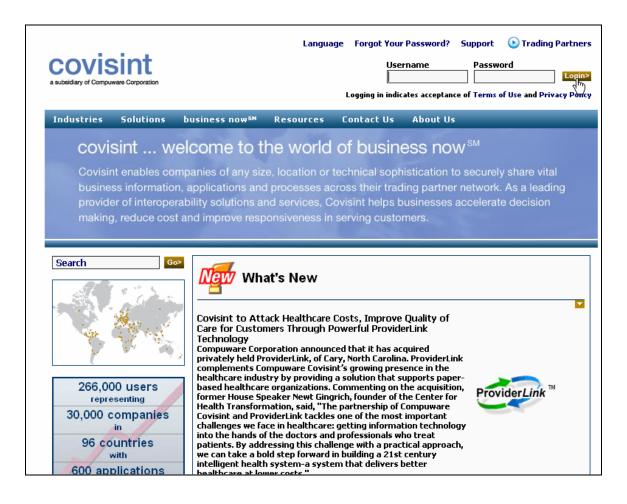|	DEFINITION OF USER ROLES
	General User - A user authorized by a plant administrator or Central Administrator to view and/or update carbon copy rules. **Plant Administrator – an administrator authorized by a central administrator to delegate general User roles at authorized plant(s), and view and/or update carbon copy rules.** Central Administrator – The key administrator of the entire MGO Advanced Carbon Copy system. Authorizes all levels of ACC users and limits their capabilities to the plants for which they are responsible.

Accessing Advanced Carbon Copy

Complete the following steps to access GM Carbon Copy:

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

2 Key in your Covisint **Username** and **Password** and click **Login**. The Covisint **Portal Home** page displays.

3 Select **Covisint Connect** from the *Portal Home* page under `Covisint Applications` (in the left pane of the page). The **COVISINT CONNECT** application is displayed.

Please recall that tasks are performed **PER PROFILE**. Therefore, any tasks performed affect only the current profile displayed. Please verify that the profile displayed in the top right corner of the screen is that in which you wish perform administration, for example:

If it is not, switch profiles by clicking the profile name, and selecting your targeted profile from the menu listed:

4. Click **Administration** tab.

5. Click **GM Advance Carbon Copy** tab.

RESULT

You have successfully logged in to GM Carbon Copy functionality of the Connect application.

Adding Users / CISCO Code Combinations

A Plant Administrator must add a user to Carbon Copy, associate each user to one or more CISCO codes. Users are added to Carbon Copy with the "general user" role.

	USERS MUST ALREADY BELONG TO A PROFILE IN THE COVISINT CONNECT APPLICATION IN ORDER TO BE AVAILABLE TO BE ADDED TO ADVANCED CARBON COPY. ONLY THE CENTRAL ADMINISTRATOR CAN ASSIGN THE ROLE OF "PLANT ADMIN".

Complete the following steps to add users / CISCO codes

1. From the Administration menu, click **GM Carbon Copy** tab.
2. Within the GM Carbon Copy tab, click **Users** tab.

3. In the *User ID* open text box, key in the User ID of the person you wish to add. (Alternately, you may search for a user by clicking the icon).
4. Key in the valid CISCO in the *CISCO* open text field.
5. Click **Add New**.

RESULT
You have successfully added a new user and assigned to a CISCO code.

Deleting a User and / or CISCO Code

A user may belong to one or many CISCO codes. Deleting a user from one CISCO code only removes the user from that particular CISCO code, and does not impact other CISCO codes related to that user.

Administrators are also able to remove a CISCO code from Carbon Copy.

Complete the following steps to delete a user from a CISCO code, and / or to delete a CISCO code from carbon copy:

1.   From the Administration menu, click **GM Carbon Copy** tab.

2.   Within the GM Carbon Copy tab, click **Users** tab.

3.   Navigate to the User and CISCO List section of the screen.

4. Perform one or more of the following:

IF YOU WISH TO...	THEN...	
Remove a User from any number of CISCO codes to which the user is associated	**a**	In the *Search for a User ID* open text field, key in the user's ID.
	b	Click **Search**. The results display all of the CISCO codes belonging to that user.
	c	Enable the checkbox of each User / CISCO relation displayed for that user that you wish to delete. (Navigate to additional pages when required).
	d	Click **Delete**.
Delete a CISCO code from Carbon Copy	**a**	In the *Search for CISCO* open text field, key in the CISCO code you wish to remove from Carbon Copy.
	b	Click **Search**. The results display all of the users belonging to that single CISCO code.
	c	Enable the checkbox of each User / CISCO relation displayed. (Navigate to additional pages when required).
	d	Click **Delete.** The CISCO code is removed from Carbon Copy. The users' associations to other CISCO codes are not impacted.

RESULT

You have successfully deleted a user from a CISCO code and/or a CISCO code from Carbon Copy.

TOPIC REVIEW

Summary

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

- Add Carbon Copy Users
- Add CISCO Codes
- Delete Carbon Copy Users
- Delete CISCO Codes

> This module has defined the steps for managing Users within Carbon Copy.
>
> The next module will cover managing inbound carbon copy rules.

✔ MODULE 2: MANAGING INBOUND CARBON COPY RULES

About this Module

The purpose of this module is to direct the Plant Administrator through the functionality of managing inbound carbon copy rules.

Module Objectives

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

- Create Inbound Carbon Copy Rules
- Manage Inbound Carbon Copy Rules

Adding New Inbound Carbon Copy Configurations

Plant Administrators are able to create and add inbound carbon copy configurations based on COM codes. Optionally, the administrator can filter carbon copies further by specifying the:

- Ship To
- Ship From
- SCAC
- DESADV

Complete the following steps to add a new inbound Carbon Copy configuration:

1. From the Administration menu, click **GM Carbon Copy** tab.
2. Within the GM Carbon tab, click **Inbound** tab.

3.   Navigate to the Add New Carbon Copy Configuration section of the screen.

4.   Optionally, select the *Ship To* from the drop box.

5.   Optionally, key in the *Ship From ID* in the open text box

6.   Optionally, key in the *SCAC* code in the open text box.

7.   Key in the required *COM* code in the open text box.

8.   By default, the DESADV is turned on. Enable the **OFF** button if you do not wish to apply this carbon copy rule to the DESADV.

9.   Click **Add.**

RESULT

You have successfully added a new inbound Carbon Copy Configuration.

Moving Inbound Carbon Copy Codes to other COM Codes

Plant Administrators are able to move inbound carbon copy configurations to other COM codes.

Complete the following steps to add a move inbound Carbon Copy configuration:

1. From the Administration menu, click **GM Carbon Copy** tab.

2. Within the GM Carbon tab, click **Inbound** tab.

3. Navigate to the Move Carbon Copy Code section of the screen.

4. Optionally, select the *Ship To* from the drop box.

5. Optionally, key in the *Ship From* in the open text box

6. Optionally, key in the *SCAC* code in the open text box.

7. Key in the required *Current COM* code in the open text box.

8. Key in the required *New COM* code in the open text box.

9. Click **Move.**

RESULT
You have successfully moved a new inbound Carbon Copy rule.

Managing Inbound Carbon Copy Rules

Plant Administrators are able to manage inbound carbon copy rules. This includes the ability to inactivate, activate, and delete existing rules.

Complete the following steps to manage existing inbound Carbon Copy rules:

1.   From the Administration menu, click **GM Carbon Copy** tab.

2.   Within the GM Carbon tab, click **Inbound** tab.

STATUS ICONS DEFINED:

= INACTIVE STATUS   = ACTIVE STATUS

3.   Scroll to the *Current Available* section of the screen.

4.   Search and select the carbon copy rule you wish to manage.

> **NOTE:** Narrow your search results by filtering your search criteria. For example, you may wish to view only Inactive codes by selecting "inactive" in the Status drop box. Other options include viewing codes with status of "active", or viewing both statuses by selecting "all".

5.   Perform one or more of the following:

IF YOU WISH TO...	THEN...	
Inactivate a Rule	a	Enable the checkbox in the *status column* of the rule you wish to inactivate.
	b	Click **Active/Inactive** button.
	c	Click **Save**. The screen refreshes, the Status icon changes to Inactive, and a confirmation message is displayed at the top of the screen.
Activate a Rule	a	Enable the checkbox in the *status column* of the rule you wish to activate.
	b	Click **Active/Inactive** button.
	c	Click **Save**. The screen refreshes, the Status icon changes to Active, and a confirmation message is displayed at the top of the screen.
Delete a Rule	a	Enable the checkbox of the rule you wish to delete.
	b	Click **Delete**.
	c	Click **OK** in the box confirming that you wish to delete the rule. The screen refreshes and a confirmation message is displayed at the top of the screen. The rule is deleted and removed from Carbon Copy.
Turn off DESADV for a rule	a	Enable the **OFF** radio button in the DESADV column of the rule for which you wish to disable DESADV.
	b	Click **Save**. The screen refreshes and a confirmation message is displayed at the top of the screen.
Turn on DESADV for a rule	a	Enable the **ON** radio button in the DESADV column of the rule for which you wish to enable DESADV.
	b	Click **Save**. The screen refreshes and a confirmation message is displayed at the top of the screen.

RESULT
You have successfully managed inbound Carbon Copy rules.

TOPIC REVIEW

Summary

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

- Create Inbound Carbon Copy Rules
- Manage Inbound Carbon Copy Rules

This module has described the steps required to create and manage inbound carbon copy rules.

The next module will cover managing outbound carbon copy rules.

☑ MODULE 3: MANAGING OUTBOUND CARBON COPY RULES

About this Module

The purpose of this module is to direct the Plant Administrator through the functionality of managing outbound carbon copy rules.

Module Objectives

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

- Create Outbound Carbon Copy Rules
- Manage Outbound Carbon Copy Rules

Adding New Outbound Carbon Copy Rules

Plant Administrators are able to create and add outbound carbon copy configurations based on COM codes. Optionally, the administrator can filter carbon copies further by specifying the:

- Ship To
- Supplier Code
- DELFOR
- DELJIT
- INVRPT
- RECADV

Complete the following steps to add a new outbound Carbon Copy configuration:

1. From the Administration menu, click **GM Carbon Copy** tab.

2. Within the GM Carbon tab, click **Outbound** tab.

3.   Navigate to the Add New Carbon Copy Configuration section of the screen.

4.   Optionally, select the *Ship To* from the drop box.

5.   Optionally, key in the *Supplier Code* in the open text box.

6.   Optionally, key in the *SCAC* code in the open text box.

7.   Key in the required *COM* code in the open text box.

8.   By default, the DELFOR, DELJIT, INVRPT, and RECADV is turned on. Enable the **OFF** button of any item to which you do not wish to apply this carbon copy rule.

9.   Click **Add.**

You have successfully added a new outbound Carbon Copy Configuration.

Moving Outbound Carbon Copy Codes to other COM Codes

Plant Administrators are able to move outbound carbon copy configurations to other COM codes.

Complete the following steps to add a move outbound Carbon Copy configuration:

1. From the Administration menu, click **GM Carbon Copy** tab.

2. Within the GM Carbon tab, click **Outbound** tab.

3. Navigate to the Move Carbon Copy Code section of the screen.

4. Optionally, select the Ship To from the drop box.

5. Optionally, key in the Supplier Code in the open text box

6. Key in the required Current COM code in the open text box.

7. Key in the required New COM code in the open text box.

8. Click **Move**.

RESULT
You have successfully moved a new outbound Carbon Copy rule.

Managing Outbound Carbon Copy Rules

Plant Administrators are able to manage outbound carbon copy rules to other COM codes. This includes the ability to inactivate, activate, and delete existing rules.

Complete the following steps to manage existing inbound Carbon Copy rules:

1. From the Administration menu, click **GM Carbon Copy** tab.

2. Within the GM Carbon tab, click **Outbound** tab.

STATUS ICONS DEFINED:

= INACTIVE STATUS   = ACTIVE STATUS

3.   Scroll to the *Current Available* section of the screen.

4.   Search and select the carbon copy rule you wish to manage.

NOTE: Narrow your search results by filtering your search criteria. For example, you may wish to view only Inactive codes by selecting "inactive" in the Status drop box. Other options include viewing codes with status of "active", or viewing both statuses by selecting "all".

5.   Perform one or more of the following:

IF YOU WISH TO...	THEN...
Inactivate a Rule	**a** Enable the checkbox in the *status column* of the rule you wish to inactivate. **b** Click **Active/Inactive** button. **c** Click **Save**. The screen refreshes, the Status icon changes to Inactive, and a confirmation message is displayed at the top of the screen.
Activate a Rule	**a** Enable the checkbox in the *status column* of the rule you wish to activate. **b** Click **Active/Inactive** button. **c** Click **Save**. The screen refreshes, the Status icon changes to Active, and a confirmation message is displayed at the top of the screen.
Delete a Rule	**a** Enable the checkbox of the rule you wish to delete. **b** Click **Delete**. **c** Click **OK** in the box confirming that you wish to delete the rule. The screen refreshes and a confirmation message is displayed at the top of the screen. The rule is deleted and removed from Carbon Copy.
Turn off *document type* **for a rule**	**a** Enable the **OFF** radio button in the column of the document type of the rule for which you wish to disable. **b** Click **Save**. The screen refreshes and a confirmation message is displayed at the top of the screen.
Turn on *document type* **for a rule**	**c** Enable the **ON** radio button in the column of the document type of the rule for which you wish to enable. **d** Click **Save**. The screen refreshes and a confirmation message is displayed at the top of the screen.

RESULT
You have successfully managed outbound Carbon Copy rules.

TOPIC REVIEW

Summary

You have just completed **MODULE 3.** You are now able to:

- Create Outbound Carbon Copy Rules
- Manage Outbound Carbon Copy Rules

This module has described the steps required to create and manage outbound carbon copy rules.