

EXTRICITY

B2B

ALLIANCE MANAGER

EXTRICITY IFORMS USER'S GUIDE



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EXTRICITY™

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INTRODUCING EXTRICITY iFORMS

Welcome to Extricity iForms 4.5, a sophisticated, browser-based application for business-to-business integration that uses Extricity B2B Alliance Manager™ technology. Extricity iForms is based on Alliance Manager *processes*, which define the flow of actions and business information between business partners.

- *About Extricity iForms* on page 2.
- *Working with Extricity iForms* on page 4.

ABOUT EXTRICITY IFORMS

iForms provides a browser-based data entry system that allows you to interact with Alliance Manager processes without integrating through an adapter to a legacy or back-end application. Using a form in a browser, you can quickly get data into and out of the Alliance Manager system for both testing and ongoing production purposes.

iForms provides the following features:

- A packaged web application provides an Inbox for viewing and responding to documents, a Start page for initiating new processes and sending documents, an Audit page that lists active and completed processes, and an Admin page used to change a process status from test to production.
- An automatically generated private process defines the interaction with the web application and handles the exchange of *business objects* (documents or forms) between the public process participants.
- Dynamically created HTML forms (using Java Server Pages from the XML business objects) provide a way to both view and enter data. When you need to respond to an incoming document, Extricity iForms automatically generates a response document and fills in fields, where possible, with matching data elements.

With Extricity iForms, you can rapidly facilitate your internal Alliance Manager implementation. The following section discusses using Extricity iForms.

USING EXTRICITY IFORMS

Extricity iForms provides a forms-based interface you can use to enter data into business objects and view business objects. Extricity iForms automatically generates the forms based on the XML business objects. You can immediately begin working with processes defined in Alliance Manager. Instead of building or installing adapters that connect to your legacy systems, you can use the generated forms to interact with the system. Use Extricity iForms for prototyping, as an interim solution while integrating with your legacy applications, or as a permanent solution for data entry and viewing.

The screenshot shows a web-based form titled "Purchase Order Change Request". The form is displayed within a browser window with a navigation sidebar on the left containing buttons for "Home", "Start", "Audit", and "Admin". The main content area has a header with the text "You are creating a new Purchase_Order_Change_Request!" and "2:Purchase_Order_Change_Request.3 for transmission to Peregrine. For help, see legend." Below this, there are several sections of input fields:

- Purchase_Order_Change_Request**
 - PO_Summary_Info**
 - PO Number *
 - PO Release Number
 - Contract Number
 - PO Date *
 - Vendor Number *
 - Shipment Method
 - Payment Terms
 - Order Total *
 - PO_Summary_Addenda add
 - Buyer**
 - ID *
 - Company Name *
 - Attention To
 - Email Address
 - Phone
 - Fax
 - Address

At the top right of the form, there are buttons for "start", "create iFO", "confirm", and "Next".

Extricity iForms automatically generates your forms from the business object.

WORKING WITH EXTRICITY IFORMS

Before using Extricity iForms, the Process Manager must be installed on your computer. You also need to have a user name and password and the Extricity iForms web site address (the URL link). See *Getting the URL address* on page 6.

Here is a brief overview of the steps involved in working with Extricity iForms.

- STEP 1** Make sure the Process Server is running.
- STEP 2** Open your browser and link to the Extricity iForms web site.
- STEP 3** View your Inbox and respond as needed, or start a process.
- STEP 4** Fill out and review the form.
- STEP 5** Send the form to your trading partner.
- STEP 6** Monitor progress and check final status of processes.

These steps are covered in the remaining chapters of this guide.

EXTRICITY iFORMS BASICS

Read this chapter for information about starting and ending an Extricity iForms session and using the Process Manager window. This chapter gives an overview of each page of the web site. For specific information on how to use each page, see the next chapter, *Working with iForms*.

- *Starting an Extricity iForms session* on page 6.
- *About the Extricity iForms window* on page 8.
- *Ending an Extricity iForms session* on page 17.

STARTING AN EXTRICITY IFORMS SESSION

Extricity iForms is a component of Alliance Manager, a software package for business-to-business communications. Alliance Manager is a client/server application, which means that the server needs to be running to run the client. Extricity iForms is a client of the server. You use Extricity iForms to do your work and the server application works behind the scenes to process your information.

Once the Process Server is running, you can start Extricity iForms from a browser window.

GETTING THE URL ADDRESS

Check with your Alliance administrator for the URL address. You can also figure out the address by looking in the Process Server window. You'll need the HTTP host and port.

To figure out the URL:

- 1 Start the Process Server and click the Properties tab.

See the *Alliance Manager Administrator's Guide* for instructions on starting the server.

- 2 Check the following two lines:

CRStation.HTTP.Host

CRStation.HTTP.Port

- 3 Note down the host name and port number.

The form of the URL is:

`http://host:port/Extricity/Alliance/Web/iForms/login.jsp`

For example, if CRStation.HTTP.Host=ABC and CRStation.HTTP.Port=8080, the URL would look like this:

`http://ABC:8080/Extricity/Alliance/Web/iForms/login.jsp`

STARTING THE PROCESS SERVER

Check with the Alliance administrator to make sure that the Process Server is running. (Administrators: see the *Alliance Manager Administrator's Guide* for instructions on starting the server.)

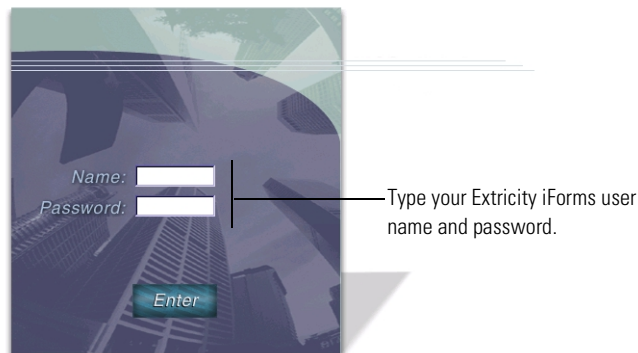
STARTING EXTRICITY IFORMS

You use a browser to run Extricity iForms. Browsers, such as Netscape Navigator or Microsoft Internet Explorer, let you connect directly to specific Web sites using Internet addresses (also called URLs). The browser must be Java-enabled (Netscape Navigator 3.x or later or Microsoft Internet Explorer 3.x or later). You will need the URL address (see [Getting the URL address](#) on page 6), a user name, and a password to log on. Check with the Alliance administrator for this information.

To start Extricity iForms from a browser:

- 1 Open your browser.
- 2 In a browser, enter the URL address.

If you don't know the URL, see [Getting the URL address](#) on page 6. The Extricity iForms login screen appears.



- 3 Type your user name (login name) and password. Click **Enter**.

User names are not case sensitive, but passwords are. Extricity iForms appears in your browser window.

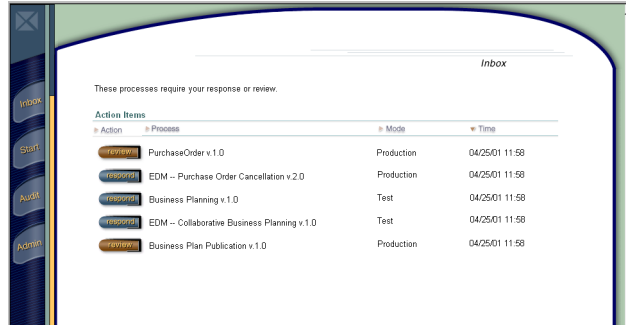
Administrators: User names and passwords are set using the Process Manager. See the *Alliance Manager Administrator's Guide*.

NOTE: If the login page does not appear in the browser, the Process Server is probably not running. If the login page appears but you are unable to log in, you might be using an incorrect name or password. Check with your administrator to restart the server or supply the correct name and password.

ABOUT THE EXTRICITY IFORMS WINDOW

The Extricity iForms window is divided into two parts: a panel of menu buttons on the left and the Web site page on the right.

Menu buttons take you to Extricity iForms web pages.



Extricity iForms Web site page.

ABOUT THE MENU BUTTONS

Extricity iForms consists of four pages, each providing access to the various features of Extricity iForms. The menu buttons on the Extricity iForms web site display the web pages.

To

Click

View and respond to your action items



Start a process, such as a purchase order or order cancellation



Track the progress or status of action items



Move a process from Test mode to Production mode



ABOUT THE EXTRICITY IFORMS WEB PAGES

The Extricity iForms web pages give you access to the various processes developed by the process author. A web page lists the items you can select and after selecting an item, Extricity iForms displays another page specific to that item. For example, selecting an item in your Inbox that needs your response displays a page that shows the actual document.

Selecting this item to respond to...

Action	Process	Mode	Time
respond	EDM -- Purchase Order Cancellation v.2.0	Production	12/28/99 14:06
respond	EDM -- Collaborative Business Planning v.1.0	Test	12/28/99 14:06
respond	Business Planning v.1.0	Test	12/28/99 14:06
respond	Business Plan Publication v.1.0	Test	12/28/99 10:55

...displays the actual document you need to respond to.

This Purchase_Order_Cancellation was sent to you by Trading Partner.
Review the information, then respond to Trading Partner with a Purchase_Order_Cancellation_Acknowledgement on the next page.

From: Trading Partner
Purchase_Order_Cancellation

pe_header

- pe_number >>> 0938402
- contract_number >>> 234-909-00
- order_date >>> January 30, 2000
- seller_id >>> 64-555
- cancellation_type >>> 07
- cancellation_reason >>> overstocked
- generation_date >>> January 31, 2000









pe_line

- gln >>> 898-000
- supplier_sku >>> 234962304
- line_number >>> 1
- description >>> crystal vase
- quantity >>> 100

TAKING AN ACTION

To select any item on one of the web pages, click the button to the left of the item name. The names on the buttons vary depending on the web site page and actions you can take. After clicking a button, you see the document or form on its own page.

The following table describes all the buttons that appear on the Web site pages.

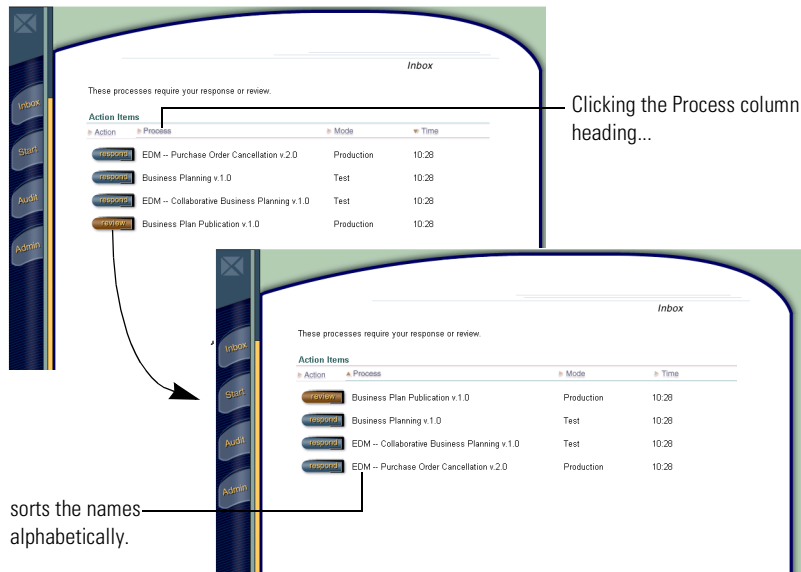
Page	Action	What It Means
Inbox		Your trading partner has sent a document to you for your review.
		Your trading partner has sent a document to you, and expects a response.
Start		You can start any process listed. This creates an action item for your trading partner.
Audit		You can look at processes that are still active.
		You can open a folder that contains all processes that were started on a particular day. Then you can select a stored process by date to review.
		When your trading partner tells you to, you can cancel a currently running process.
		You can find a process by the specific information in a searchable field, for example, by purchase order number.
Admin		When your trading partner tells you a process is ready for Production mode, you can activate it.

SORTING THE LIST

You can sort the items on the Extricity iForms web site pages based on the contents of any column in ascending or descending order. (The column headings change depending on the web page.)

- ▶ To sort by a particular column, click it.

For example, in the Inbox the column headings are: Action Items, Process, Mode, and Time.



Clicking the column heading once sorts in ascending order; clicking it again sorts in descending order. The arrow next to the column heading changes depending on how the list is sorted by that column.

▶ Process
Not sorted by this heading

▲ Process
Sorted by this heading in ascending order

▼ Process
Sorted by this heading in descending order

The page remains sorted in the order you select until you end the Extricity iForms session.

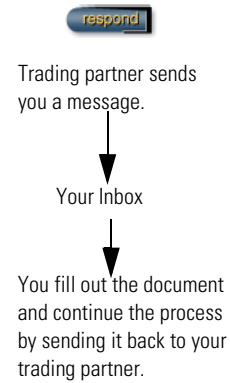
The following sections briefly describe each of the four Extricity iForms web site pages.

THE INBOX

The Extricity iForms Inbox works much like an e-mail inbox. The action items that appear in your Inbox are similar to an exchange of e-mails between you and your trading partner, but in Extricity iForms, the subject of the message is the name of a process.

Action items are classified in two categories: review and respond

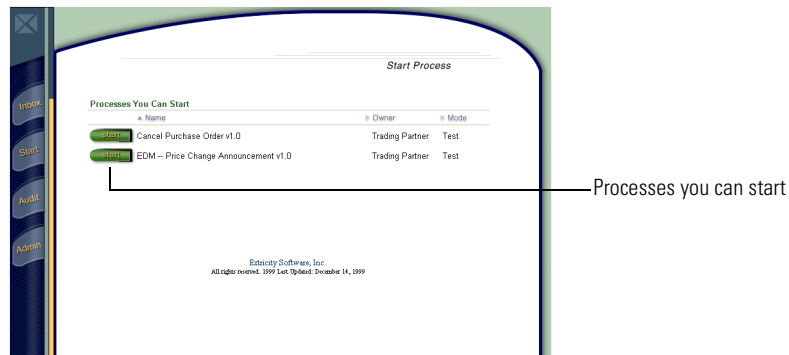
Inbox



THE START PAGE

The Start page lists *processes* that you can initiate. A process is an exchange of business information between partners, such as a form with fields for data or a document consisting of text. A process consists of all the steps needed to complete the exchange of business information from beginning to end.

If you are the person who takes the first step in a process, you are the *initiator* of that process. Only the processes you can initiate appear on the Start page.



An example of a common process is a purchase order. Before the partners decide to use Alliance Manager and Extricity iForms, the purchase order process could have included several steps:

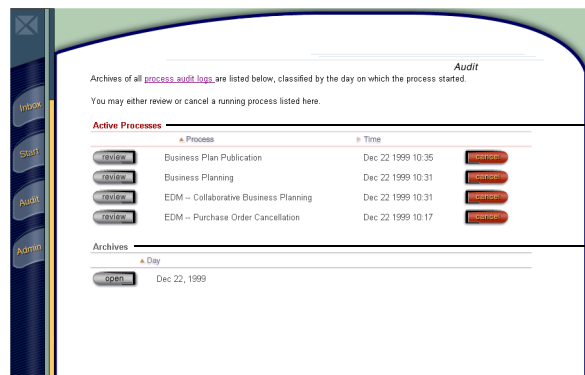
- Customer's manufacturing system generates a purchase order.
- Customer prints and faxes the purchase order to the Supplier.
- Supplier receives the fax, notifies the order department, confirms the order contains all the necessary and correct information, and enters the order into the order entry software.
- Supplier faxes an order confirmation back to Customer.
- Customer receives the confirmation and schedules receipt against the purchase order.

The Alliance Manager process author designs a process that automates these steps. With Extricity iForms, you participate in the automated business process through your web browser. Starting a process begins an exchange with your trading partner.

When you start a process or send a response to continue a process, you may see a response from your trading partner very quickly after you send it, since the processes on their end are automated. Their response appears in your Inbox (these may be sent for your review, or they may require additional responses from you).

THE AUDIT PAGE

The Audit page lists all the processes that are currently in progress or that have been completed. You use this page to track the status of processes.



The screenshot shows the 'Audit' page with the following content:

Audit
Archives of all [process audit logs](#) are listed below, classified by the day on which the process started.
You may either [review](#) or [cancel](#) a running process listed here.

Active Processes

Process	Time
review Business Plan Publication	Dec 22 1999 10:35 response
review Business Planning	Dec 22 1999 10:31 response
review EDM -- Collaborative Business Planning	Dec 22 1999 10:31 response
review EDM -- Purchase Order Cancellation	Dec 22 1999 10:17 response

Archives

Day
open Dec 22, 1999

Labels on the right side of the screenshot:

- Currently pending items (points to the Active Processes table)
- Daily storage of processes (points to the Archives table)

On any day a process has started, Extricity iForms automatically creates a folder and stores the processes by their start dates. You can open a folder to review the history of your exchanges with your trading partner.

NOTE: If you cannot find a process folder, it may have been removed due to regularly scheduled cleanup. Ask your Alliance administrator to restore it.

THE ADMIN PAGE

The Admin page lists all the active processes and their installation status. You use this page to activate processes that are currently installed for testing. Activating a process moves it from Test mode to Production mode.



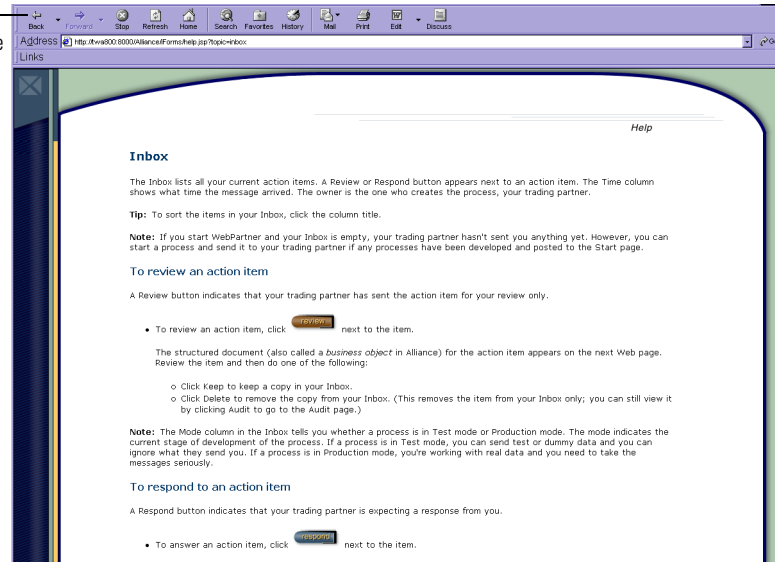
All processes start out in Test mode and remain in Test mode until all partners have tested and approved the process. When a process is in Test mode, it probably contains test, or dummy, data. You and your trading partner agree when to start exchanging production, or real, data. At that point, you and your trading partner both activate the process.

All processes available to you that are in Test mode appear on the Admin page. After you activate a process, it gets removed from the Admin page. If you are the initiator of the process, that process still appears on your Start page, but the mode has changed to Production.

GETTING HELP ON THE WEB PAGES

You can see online help for each page. Click the web page name (for example, Inbox or Audit) in the upper right of the page. To get back to the web page you just left, click your browser's Back button.

Click the browser's Back button to return to the page you just left.

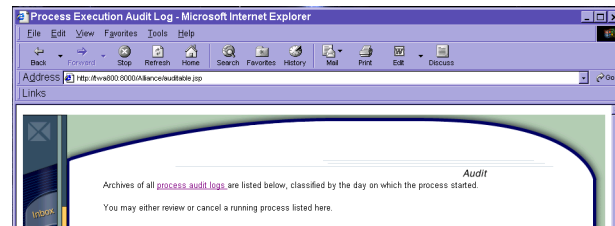


ENDING AN EXTRICITY IFORMS SESSION

At the end of an Extricity iForms session, close the browser window.

To end an Extricity iForms session:

- ▶ Click the close box in the upper right corner of the browser window.



Click here to close the browser window and end the session.

If there has been no activity during an Extricity iForms session for thirty minutes, the web server session times out and you will have to log in again, unless you are currently using the Inbox. If you need to be away from your computer in the middle of an Extricity iForms session and you do not want to have to log in again when you get back, click Inbox to display the Inbox page before you leave.

TIP: If you lose your session due to inactivity, you can return to the page you were editing. Log in to Extricity iForms again, and then use the Back button on your browser to display the page you were working on.

TIP: If you are working on sensitive data and you leave your browser window open, set up password protection on your screen saver as a precaution.



WORKING WITH IFORMS

This chapter covers how to work with iForms. The iForms web pages give you access to your processes with iForms. This chapter includes these sections:

- *Using the Inbox* on page 20.
- *Starting a process* on page 27.
- *Tracking processes* on page 29.
- *Activating processes* on page 32.

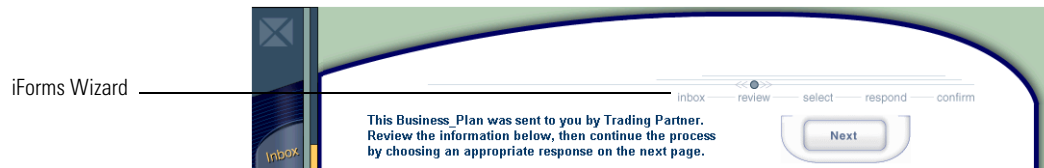
USING THE INBOX

After you enter your name and password in the login screen, the iForms Inbox appears. The Inbox is where you can find action items that need your review or response.

NOTE: If you start iForms and your Inbox is empty, there are currently no processes pending. However, you can start a process and send it to your trading partner if any processes have been developed and placed on the Start page. See *Starting a process* on page 27.

USING THE IFORMS WIZARD

In iForms, you can see an overview of the work flow by looking at the Wizard for a particular action item or process start. The Wizard appears in the upper right of the iForms web site.



DISPLAYING THE INBOX

- ▶ To go to your Inbox if it is not displayed, click Inbox.
A Review or Respond button appears next to an action item.



Action Items			
Action	Process	Mode	Time
	EDM -- Purchase Order Cancellation v.2.0	Production	14:06
	EDM -- Collaborative Business Planning v.1.0	Test	14:06
	Business Planning v.1.0	Test	14:06
	Business Plan Publication v.1.0	Test	10:55

Buttons tell you what to do for each action item.

NOTE: The Mode column in the Inbox tells you whether a process is in Test mode or Production mode. The mode indicates the current stage of development of the process. If a process is in Test mode, you can send test or dummy data and you can ignore what they send you. If a process is in Production mode, you are working with real data and you need to take the messages seriously.

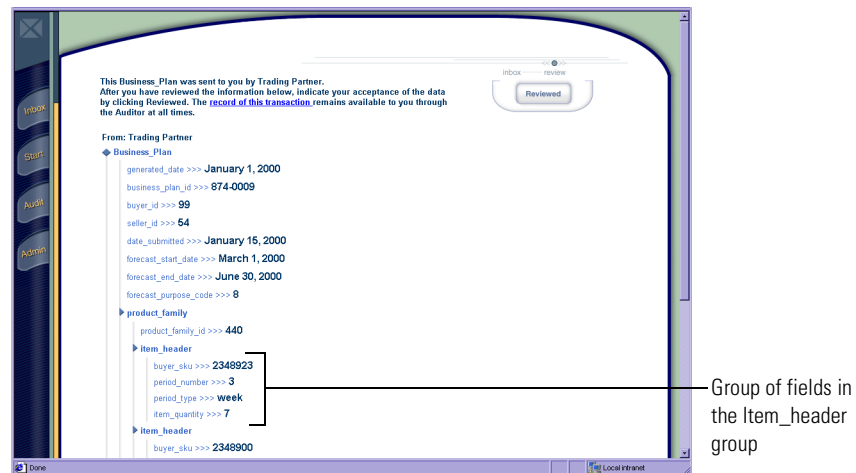
REVIEWING AN ACTION ITEM

A Review button indicates that your trading partner has sent the action item for your review only.

To review an action item:

- 1 Click Review next to the item.

The business object for the action item appears on the next web page.



A business object can contain single fields and groups of related fields. Some fields and groups may be optional and others may be required. Also some fields and groups may be repeatable, such as a line item on a purchase order. The section *Repeating fields and groups* on page 26 covers this topic in more detail.

- 2 Review the item and then click Reviewed.

This removes the item from your Inbox. You can still view it by clicking Audit to go to the Audit page.

TIP: To sort the items in your Inbox, click the column title. See *Sorting the list* on page 11.

RESPONDING TO AN ACTION ITEM

A Respond button next to an action item in the Inbox indicates that your trading partner is expecting a response from you.

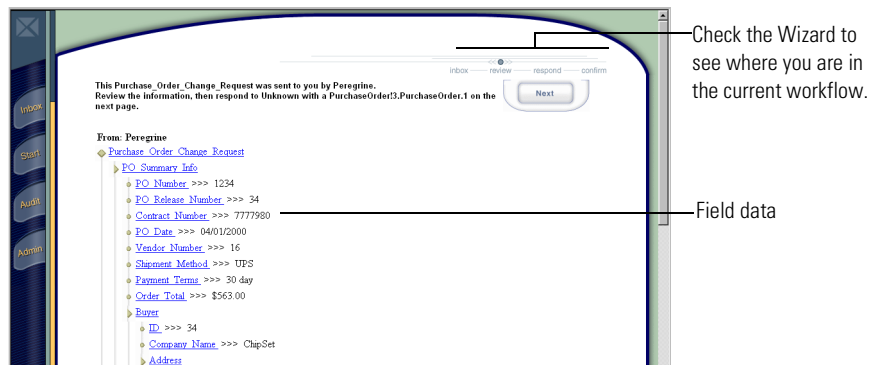
This page displays the information sent to you. You review it and then respond. At any time during these steps, you can click the Back button on your browser to return to the previous screen.

To send a response:

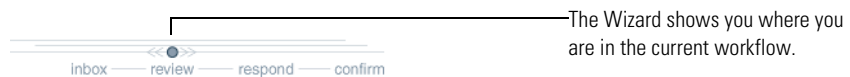
- 1 In the Inbox, click Respond next to the action item.

The business object for the action item appears on the next web page.

A business object with information for your review.



You will see a series of pages. You can look at the wizard at the upper right of the page to keep track of where you are in the process.

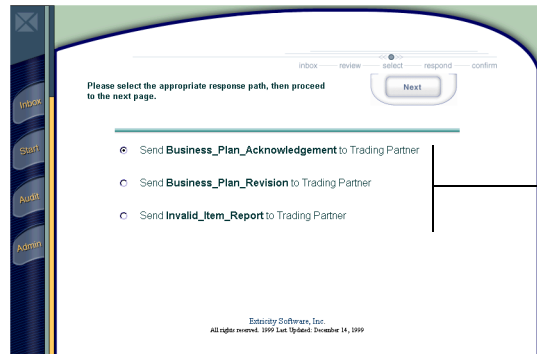


- 2 Review the document and click Next to respond.

Depending on how the process was set up, you may need to select among alternative responses before seeing the document you send back to your trading partner.



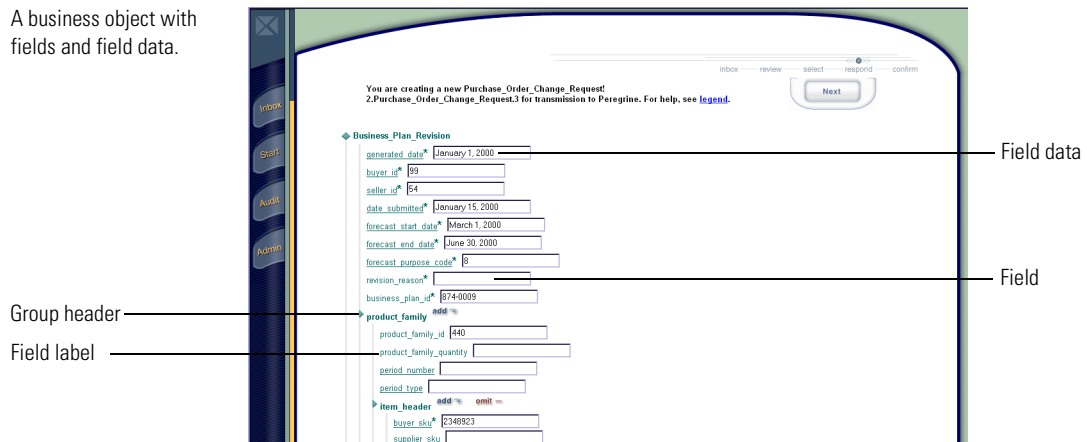
- 3 (This page may or may not appear. Skip to step 4 if you do not see a similar screen.) Choose one of the alternative responses depending on the data you reviewed on the previous page. Then click Next.



Select from one of the pre-defined responses.

- 4 When the form appears, enter information into blank fields or change the information already in a field. See *Filling in the Fields* on page 26 for details on entering information into fields.

A business object with fields and field data.



The wizard shows you where you are in the process.



When a field has the same name and position as a corresponding field on the business object you reviewed initially, it appears with information already filled in to help speed up your data entry.

A business object with some fields filled in.

You are creating a new Purchase Order Change Request:
2.Purchase_Order_Change_Request3 for transmission to Peregrine. For help, see [legend](#).

Business Plan Revision

- generated_date* [January 1, 2000]
- buyer_id [59]
- seller_id [54]
- date_submitted* [January 15, 2000]
- forecast_start_date* [March 1, 2000]
- forecast_end_date* [June 30, 2000]
- forecast_purpose_code* [B]
- revision_reason*
- business_plan_id [074-0009]
- product_family** add =

 - product_family_id [440]
 - product_family_quantity
 - period_number
 - period_type

- item_header** add = omit =

 - buyer_sku [2348923]
 - supplier_sku
 - gln
 - period_number* [3]
 - period_type* [week]
 - item_quantity* [7]

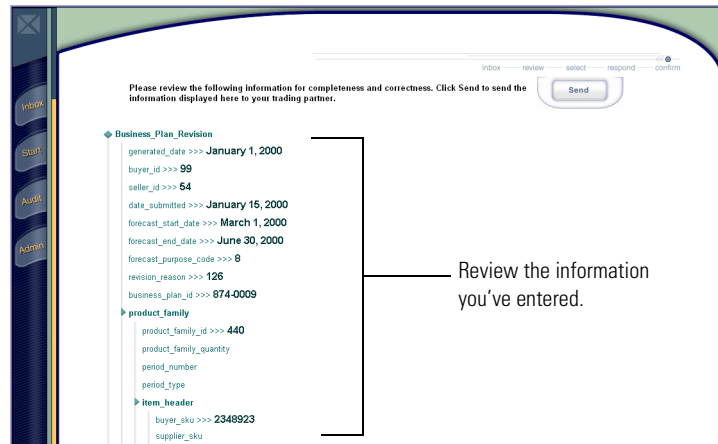
Click an underlined field name to get an explanation of what to enter in the field.

An asterisk tells you the information is required.

Depending on the process, you may see more than one form to fill out.

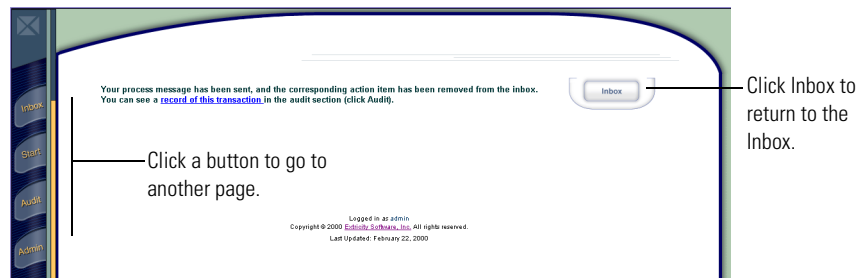
- 5 After reviewing the information you entered, click Next.

If you missed any required fields, iForms highlights them. The business object appears so you can confirm your entries before you send it.




6 Review the information and click Send.

7 At the confirmation page, click Inbox to return to the Inbox, or click one of the other buttons to display another page.



The action item no longer appears in your Inbox. You can review it by clicking Audit. It is filed by the date and time the process was started.

FILLING IN THE FIELDS

Required field *
Required searchable field 

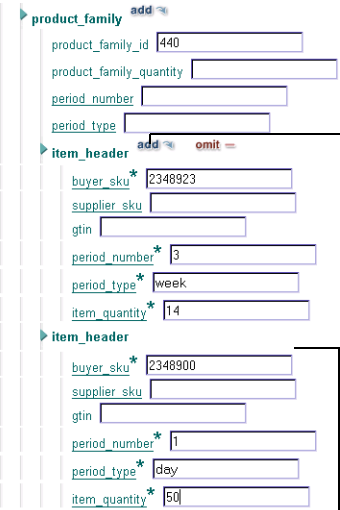
Some fields have an asterisk next to them, which means the field must be filled in. If a magnifying glass with a gold star appears, the required field is a searchable field (also called a *key field*). A searchable field can be any field that has a unique value, such as a purchase order number. Your trading partner indicates which field is searchable during the design of the process. On the Audit page, you can locate a specific form by the information in this searchable field.

REPEATING FIELDS AND GROUPS

A form can contain single fields and groups of related fields. Single fields usually contain one piece of information, such as a part number. Single fields can be grouped together if they are related in some way, for example, a Ship To group can contain all the fields necessary for the address information.

These fields or groups can also repeat. A line item group on a purchase order might be repeatable, so you can order more than one item, as needed.

In iForms, these extra lines do not appear on a form unless you need them.



Click Add above the group name...

...to repeat the group's fields.

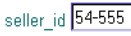

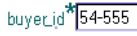






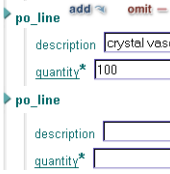
NOTE: If a business object has a repeating field, at least one field appears on the form. If a group is repeating and optional, you see just the name of the group (the header) and an Add button. If a business object has more than one repeating field or repeating group, all of them appear on the form.



On the form, you will see two buttons, Add and Omit, when a field or group is repeatable.



The following table shows the different field and group alternatives and explains what you see on the form.

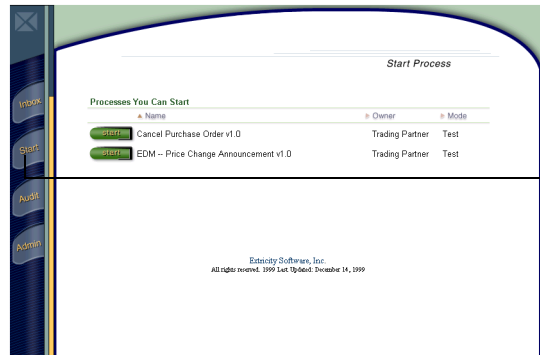
	Single and Optional	Repeatable and Optional	Single and Required	Repeatable and Required
Field	<ul style="list-style-type: none"> No button No asterisk 	<ul style="list-style-type: none"> Add and Omit buttons for the first occurrence of the field No asterisk 	<ul style="list-style-type: none"> No button Asterisk 	<ul style="list-style-type: none"> Add button for the first field; Omit button if more than one field Asterisk 
Group	<ul style="list-style-type: none"> Add button (it toggles) Omit button (it toggles)  	<ul style="list-style-type: none"> Add button for first occurrence of the group Add and Omit buttons for subsequent occurrences  	<ul style="list-style-type: none"> No buttons 	<ul style="list-style-type: none"> Add button for the first group; Omit button appears when second group is added 

STARTING A PROCESS



A *process* is an exchange of business information between partners, such as a document consisting of text. A process includes all the steps needed to complete the exchange of business information from beginning to end. Your trading partner creates online versions of these processes. If you are the person who takes the first step in a process, you are the *initiator* of that process. Only the processes you can initiate appear on the Start page. The initial author of a process is called the *owner*.

1 To display the Start page, click Start.



Click this Start button to display the Start page.



2 Click Start next to the process you want to start.

This takes you to a form where you enter information.

NOTE: You will see an error message if the user you logged in as does not have the permissions to start a process.

3 Fill out the form and click Next.

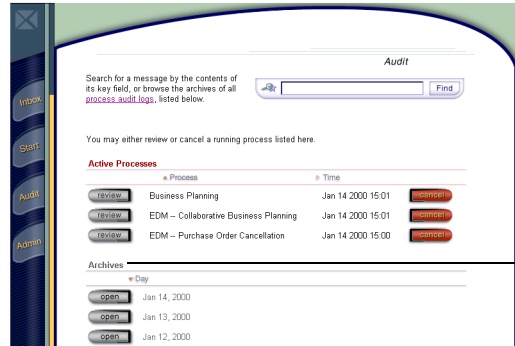
You see the data you entered on the next page.

4 Review the information and then click Start. (If you need to go back and make changes, click the Back button on your browser.)

TIP: To find a process you started and sent, look for it by start date in the Audit page. You will see the item, the time, and the current status.

TRACKING PROCESSES

iForms keeps track of processes, listing the active processes and the date and time they were started.



iForms archives all action items on a daily basis.

In the Audit page, you can cancel a process in progress, find a specific process, and review in-progress and completed processes.

TRACKING ACTIVE PROCESSES



- To track active processes, click Audit.

The Audit page lists all active and completed processes. It is divided into two sections: Active Processes and Archives.

REVIEWING AN ACTIVE PROCESS

You can review the information you entered in a process that is currently in progress. To review a process, browse the list and click Review next to the process name. You can also find a specific process by searching for it. See [Finding a specific process](#) on page 31.

CANCELLING A PROCESS IN PROGRESS

You can cancel a process in progress, but it is not recommended. Cancelling does not just cancel the particular message you sent to your trading partner. It cancels the entire process and cuts off any subsequent communication between you and your trading partner for that process.

IMPORTANT: Cancel a process only if your trading partner or Alliance administrator tells you to.

If you need to cancel a process, click Audit. In the Active Processes portion of the Audit page, you see a list of all processes in progress. Click Cancel next to the process, and click Cancel again to confirm.

NOTE: You will see an error message if the user you logged in as does not have the permissions set up to cancel a process.

TRACKING STORED PROCESSES

iForms automatically stores all processes by the date they started. You can open a folder to review the status of processes or review the actual form or document.

TIP: If the list of active processes is long, click Process Audit Logs at the top of the page to jump to the Archives section.

OPENING A STORED PROCESS

If you know the date the process started, you can open the folder for that date. You can also find a specific process by searching for it. See [Finding a specific process](#) on page 31.

- To open a folder, click Open next to the date you are looking for.
The status of a stored process can be Completed OK, In Progress, Aborting, Cancelled, Cancelled by <partner>, or Fatal Error.

NOTE: If a process is in progress, it appears in both the Active Processes section and the Archives section.

You can sort the list of processes by clicking the column heading you want to sort by. See [Sorting the list](#) on page 11.

If you see “Fatal Error” as the process status, alert your Alliance Manager administrator. The Alliance Manager process ID for that process appears in the URL for the Audit page.

REVIEWING A STORED PROCESS


After you open a folder for a specific date, a list of processes appears.

To review a process:

- 1 Click Review next to the process name.
- 2 To go back to the list of processes, click the Back button on your Browser.

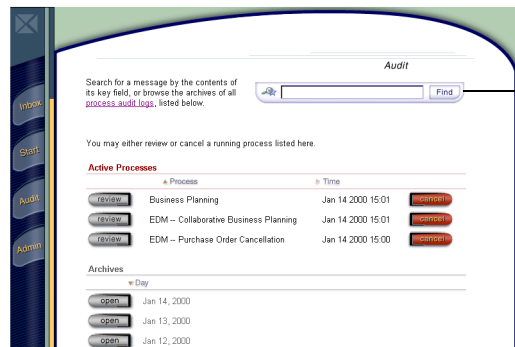
FINDING A SPECIFIC PROCESS

You can find a process by the specific information in a searchable field (also called a key field), for example, by purchase order number. iForms searches both the active processes and the stored processes.


A searchable field has this icon.

To find an item:

- 1 Click Audit to display the Audit page.



Use the Find dialog box to locate a specific item.

- 2 In the Find dialog box, type the information you want to find and click Find. You see the item displayed on the screen for your review.

ACTIVATING PROCESSES

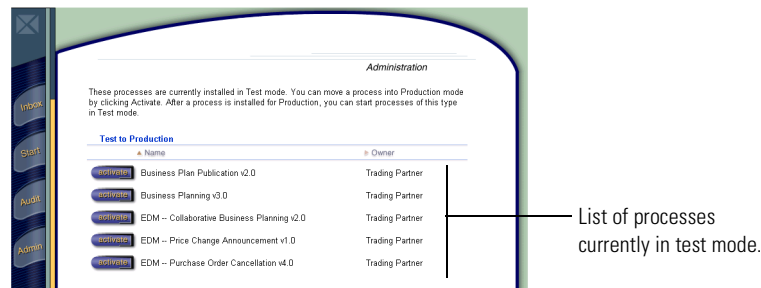
The initial author of an Alliance process is called the *owner* of the process. The partner who starts a particular process is the *initiator* of that process. When a process is first installed, the initiator can start the process only in *Test mode*. When a process is in test mode, the participants run the process to make sure it performs correctly. When both partners agree that the process works as expected, you move it into Production mode.

NOTE: You will see an error message if the user you logged in as does not have the permissions set up to activate a process.

To move a process from Test mode to Production mode:

- 1 Click Admin.

The list of all the processes currently in Test mode appears.



- 2 Click Activate next to the process you want to move into Production mode.

The next time you see this process either in the Inbox or on the Start page, it will be labeled Production instead of Test.

After your trading partner tells you to activate a process and you activate it, it gets removed from the Admin page. If you are the initiator of the process, that process will still appear on your Start page, but the mode has changed to Production.

You can still start a process in Test mode after it has been moved to Production. When you start a process, you can choose the mode you want it to run in by clicking a button on the confirmation page.

In some processes, you may have the option of sending it to different partners. On the confirmation page, you can enter the partner's name or ID number to select which partner you want to send it to.

GENERATING IFORMS PROCESSES

Read the following sections to learn how process distribution works.

- *Using iForms with Alliance Manager* on page 34.
- *Creating and distributing processes* on page 34.
- *Migrating from iForms to Alliance Manager* on page 44.

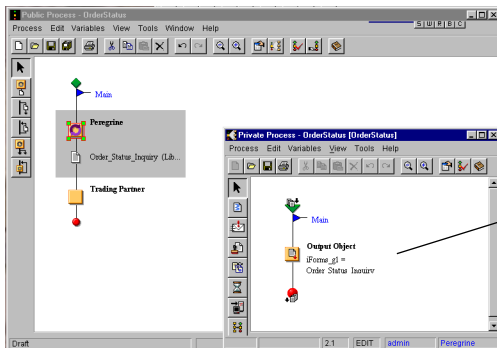
USING IFORMS WITH ALLIANCE MANAGER

An Alliance private process handles the exchange of business documents by sending the document to the iForms partner's web server. The purpose of the private process is to send and receive business objects through the iForms web site.

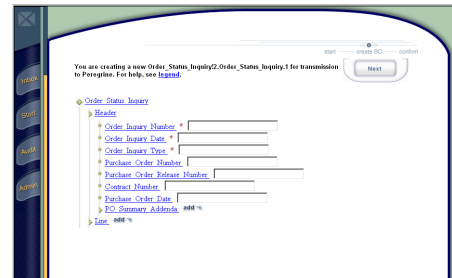
CREATING AND DISTRIBUTING PROCESSES

For each step in the public process that you want to create a browser interface access, you can generate the private processes necessary. The generated private process displays the business document on the iForms web site; the web pages are based on the business object and process structure.

The business object in the public process becomes the web page form to fill out. The generated process sets up the browser and displays the business object.



Generated private process



Business object displayed on the web page.

DISTRIBUTING PROCESSES

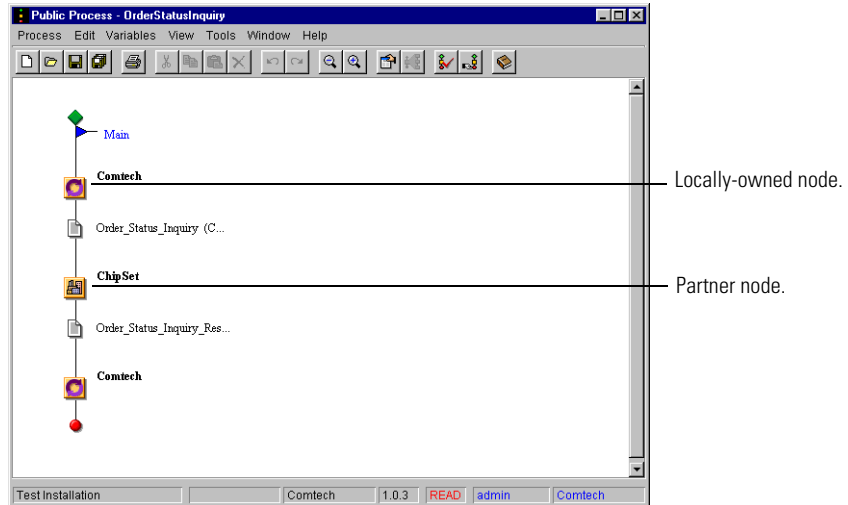
You distribute processes to iForms the same as you would for an Alliance partner. See the *Alliance Manager User's Guide*.

GENERATING PRIVATE PROCESSES

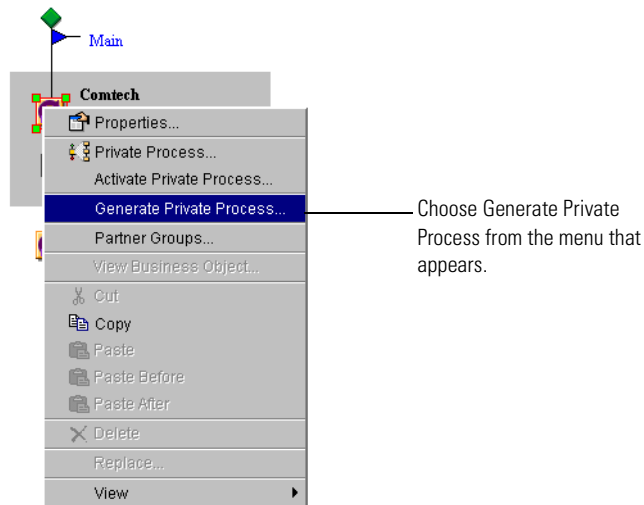
To generate a private process:

- 1 In the Process Manager window, double-click the public process that you want to generate iForms private processes for.

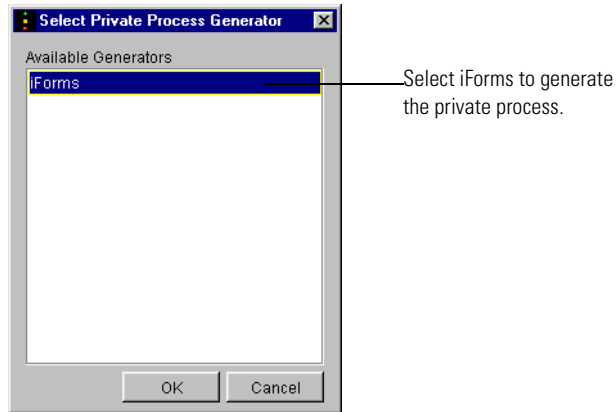
The process appears in the Public Process window.



- 2 In the Public Process window, right-click the locally-owned node you want to generate a private process for, and choose Generate Private Process.



- 3 In the Select Private Process Generator window that appears, select iForms.



If iForms does not appear in the list, iForms has not been enabled. See your Alliance administrator.

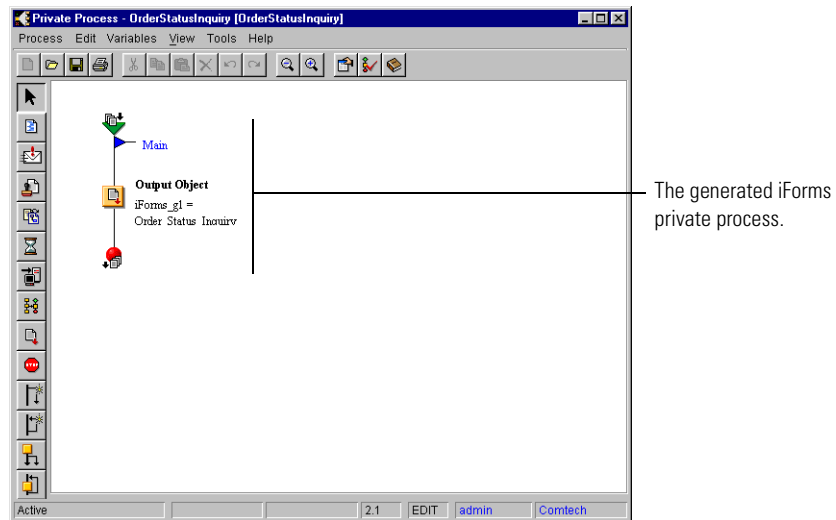
NOTE: Administrators: iForms might have been disabled. You can change the setting that control this in the `AllianceSeries.Properties` file located in `Alliance/Properties`. To enable iForms, you need to edit the file and remove the comment character (`#`). Then, restart Alliance Manager.

```
#iForms=iForms  
iForms.version=3  
iForms.revision=2  
iForms.build=3.2.1  
iForms.icon=Image.alliance
```

Remove the comment character (`#`) to enable iForms.

- 4 Click OK.

This creates a private process for the selected private process node. The Private Process window appears.



If a private process already exists for a node, Alliance saves the newly generated iForms private process as a new version.

NOTE: Since the structure of the generated private process depends on the structure of the public process, you should generate the private processes only when the public process has been approved for implementation.

There are no further steps required in creating an iForms implementation. Read the following sections for information on maintaining processes.

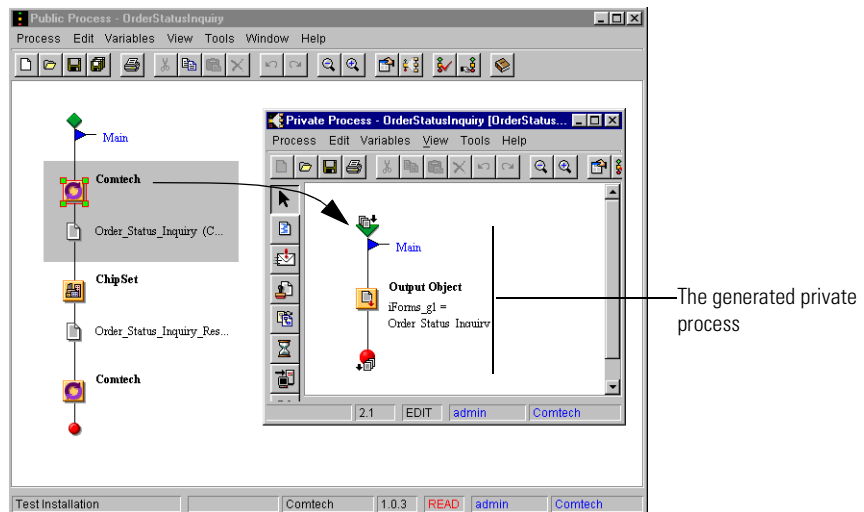
MAINTAINING PROCESSES WHERE IFORMS IS THE FIRST STEP

The only way to create an iForms private process is to right click a public process node in the Public Process window, and choose iForms from the list of generators. You can't manually configure the iForms extension action and it does not appear in the list of extension actions in the Private Process builder window.

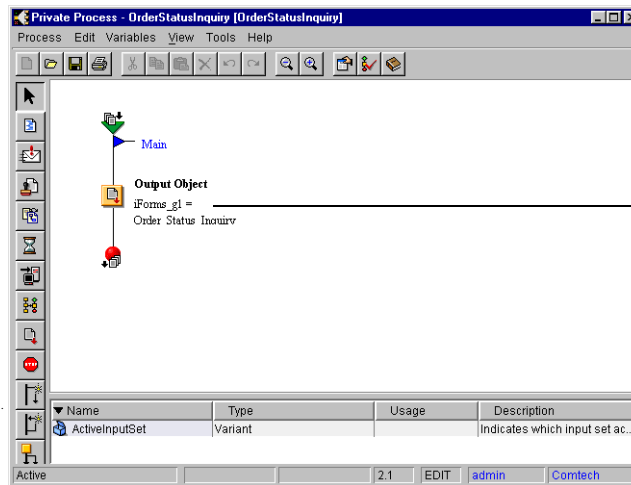
When you generate an iForms private process for the first step in a process, the generated private process follows a particular pattern. The pattern is:

- Global business object variables exist for each message in the initial partner node output set.
- Private process contains output actions, one for each global variable corresponding to the public output set.

After generating the private process, it looks like this:



Alliance Manager creates a global variable for each message in the output set during the process generation.



Global variable created during the process generation

You can customize or edit a private process once it has been generated, however if you want it to continue to appear on the iForms Start page, it must conform to the particular pattern. You can add new actions, for example, approvals or notifications, but if you change the pattern, the process will no longer appear on the Start page.

If you want to remove the process from the iForms Start page, edit the public process and remove the generated global variables. Then, edit the output actions in the private process to reference other variables.

NOTE: If you have generated an iForms implementation for the first step in a public process, you cannot start that process from the Process Manager. If you try to start the process by right-clicking the public process icon in the Process Manager window, an error appears. In the Process Manager, there is no way to supply values for the business object input. Without these values, the process won't execute.

MAINTAINING A PROCESS WHERE IFORMS IS NOT THE FIRST STEP

When you generate an iForms private process for a node with public process inputs (any node other than the first node), the generated implementation is:

- Local, private process business object variables for each message in the output set.
- Private process contains an iForms extension action followed by one or more output actions, one for each local business object variable.

MAINTAINING PROCESSES WHERE IFORMS IS THE LAST STEP

The iForms node can be the last step in a process. For example, a process might include the iForms partner receiving an invoice from a trading partner.

When you generate an iForms private process for the last step in a process, the generated private process follows a particular pattern. The pattern is:

- No global business object variables exist in the last partner node output set.
- Private process contains no output actions.

ADDING YOUR LOGO TO THE WEB PAGES

You can add your corporate logo to each page of the iForms application. The logo art must be in GIF format and it must be named logo.gif.

To add your logo:

- Replace the logo.gif file (located in alliance/com/extricity/ifforms/apps/jsp/GIFs) with your own art. Restart the Process Server.

The art will be scaled to fit the space. Your logo will look best if it is 130 pixels wide by 40 pixels tall.

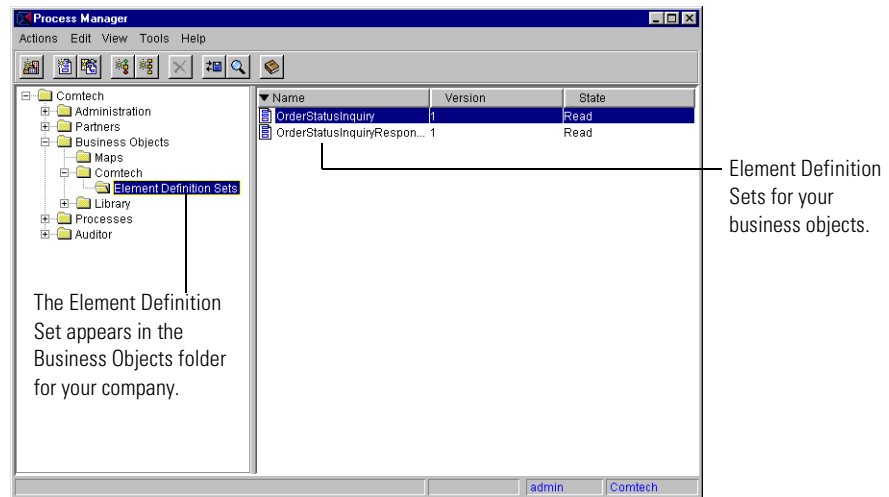
ADDING YOUR OWN HELP TO THE WEB PAGES

You can add help for fields and groups that appear in the business object displayed on the iForms web site.

NOTE: You must be the author of the public process to add help descriptions.

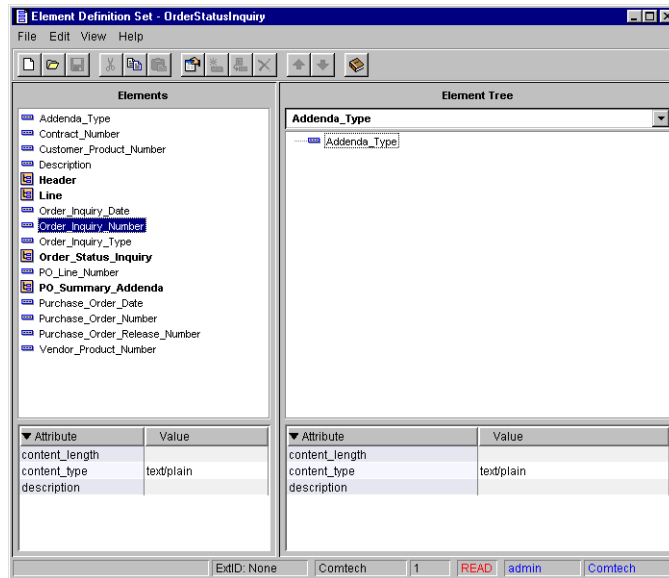
To add help for fields or groups:

- 1 In the Process Manager window, open the Element Definition Set for the business object you want to add help to.

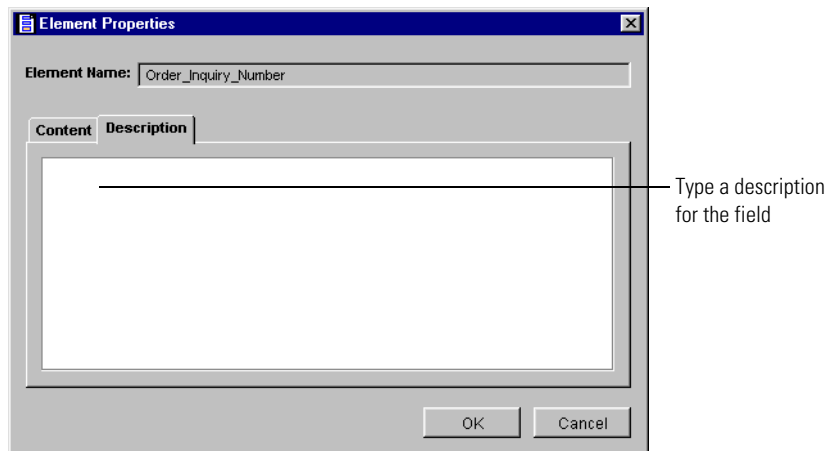


- 2 Double-click the Element Definition Set containing the fields you want to add help to.

The Element Definition Set Editor appears.

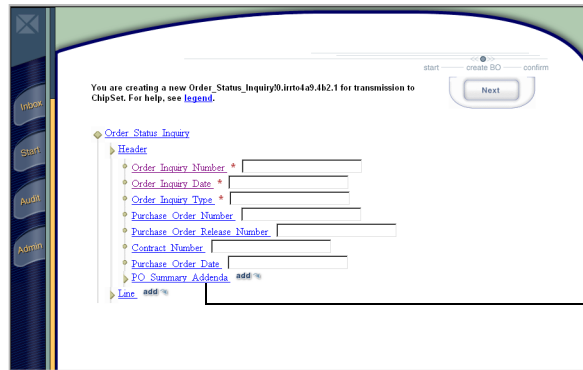


- 3 Double-click the field (or group) and then click the Description tab.



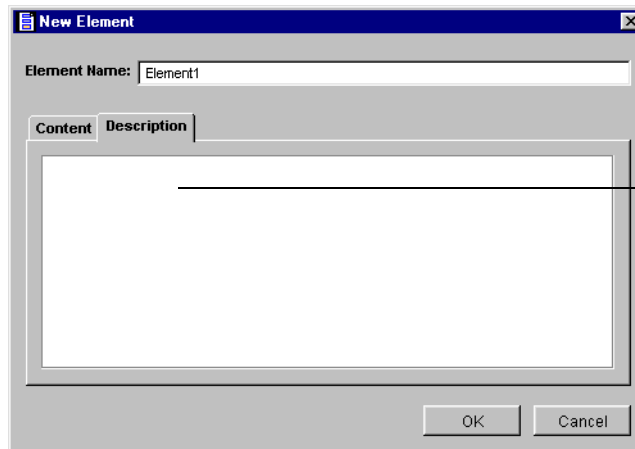
- 4 Type a description that describes what to enter in the field and click OK.

On the iForms web site, a field with a description appears underlined. Clicking the field or group name displays a description window.



Click an underlined field to display a description window.

NOTE: You can also add a description to a field as you create them. Click the Description tab and add an optional description. (See “Creating an element definition set” in the *Alliance Manager User’s Guide*.)

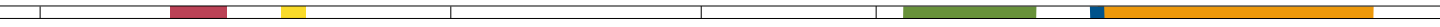


Type a description for the field

If you want to link to a web page that contains some help text, you can enter an anchor tag in the Description field. For example, if the Description field contains:

```
<a href="http://comtech/help/buyer_sku.html">text</a>
```

the word "text" will appear in blue in the description window. Clicking on it links to the URL.



NOTE: Descriptions are available only for fields, not groups.

MIGRATING FROM IFORMS TO ALLIANCE MANAGER

Extricity iForms private processes contain unique iForms extension actions, which are not like Alliance Manager extension actions. You can't manually configure the iForms extension actions. However, you can edit and maintain the generated private processes just as you can other private processes.

Typically, you start the process development process by rapidly prototyping using Extricity iForms. Eventually, you might re-implement the processes using conventional extension actions and adapters as the implementation matures.

LEARNING ABOUT PROCESS FLOWS

The information in this chapter is not essential to using Extricity iForms. It provides some background information on the logic behind the process work flows. You might want to read this chapter if you plan to start using the integration capabilities of the Alliance Manager product, or if you're curious about how processes work. This chapter includes these sections:

- *About processes* on page 46.
- *Understanding process flows in Extricity iForms* on page 47.

ABOUT PROCESSES

A process is the flow of actions and the exchange of business information between partners.

Using building blocks in the full Alliance Manager product, your trading partner models whatever type of processes your business transactions require—such as order fulfillment or sales forecasting.

Your trading partner analyzes the existing processes and identifies the workflow between partners.

They begin by looking at how the process currently works. What is its purpose? What steps are involved? What information is exchanged? Where does the information come from? Where does it go to? How does it get there? Who are the partners involved? Could the same process work with more than one partner? All of these questions help them decide what actions and information need to be included in the Alliance Manager process, and in what order.

Using a few simple tools, the Alliance Manager process designer can add and remove actions, and create whatever types of branching and looping paths needed between them. The process designer also defines the business objects used to exchange business information.

UNDERSTANDING PROCESS FLOWS IN EXTRICITY IFORMS

In Extricity iForms, you can see an overview of the work flow by looking at the Wizard for a particular action item or process start. The Wizard appears in the upper right of the Extricity iForms web site.



The process designer identifies the existing workflow between partners and translates that flow into a series of actions. In Extricity iForms, there are five process flows for the Inbox:

- You review a document.
- You review the document and then respond.
- You review a document, select a response, fill out a form, and send it.

The process flows for the Start page are similar:

- You start a process and send it.
- You select a form, start the process, and then send it.

In some cases depending on the structure of the underlying Alliance Manager process, you may have more than one document to review or form to fill out.

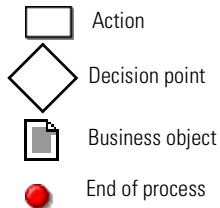
REVIEWING A DOCUMENT

The simplest process flow is where you do not have to send a response back to your trading partner. The business object is sent for your review only.

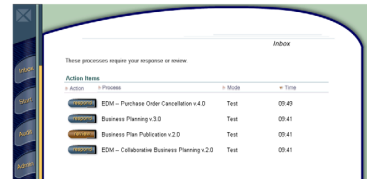



The following illustration shows the steps you take in Extricity iForms to complete this process.

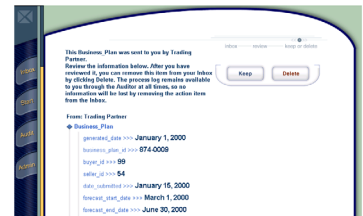
Trading partner sends a business object for your review.




 →  **Extricity iForms** receives the document in the Inbox.



 **You** review the information.



 Have you finished reviewing it and do you want to notify your trading partner?

 Reviewed

You click browser's Back button and it remains in Inbox. The underlying process remains running.



You click Reviewed and no longer see it in the Inbox. Trading partner is automatically notified and the underlying process finishes.



REVIEWING A BUSINESS OBJECT AND RESPONDING


Another process flow requires that you review the business object and send back a response.



The following illustration shows the steps you take in Extricity iForms to complete this workflow.

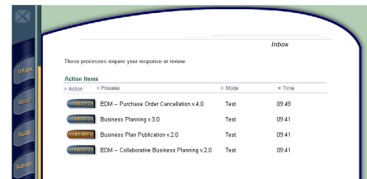
Trading partner sends a business object for your review and response.

 Action

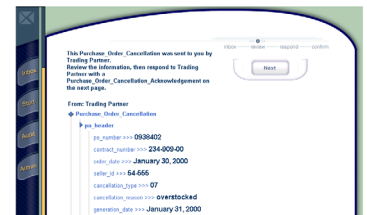
 Business object



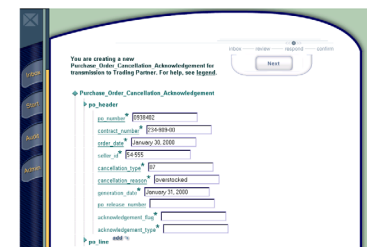
Extricity iForms receives the document in the Inbox.



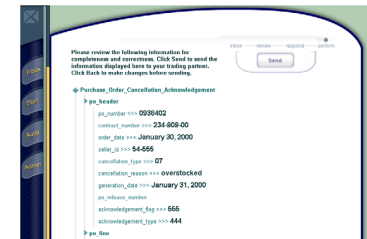
You review the information.



You respond by filling out the form.



You send the document back to **Trading partner**. The document no longer appears in the Inbox.

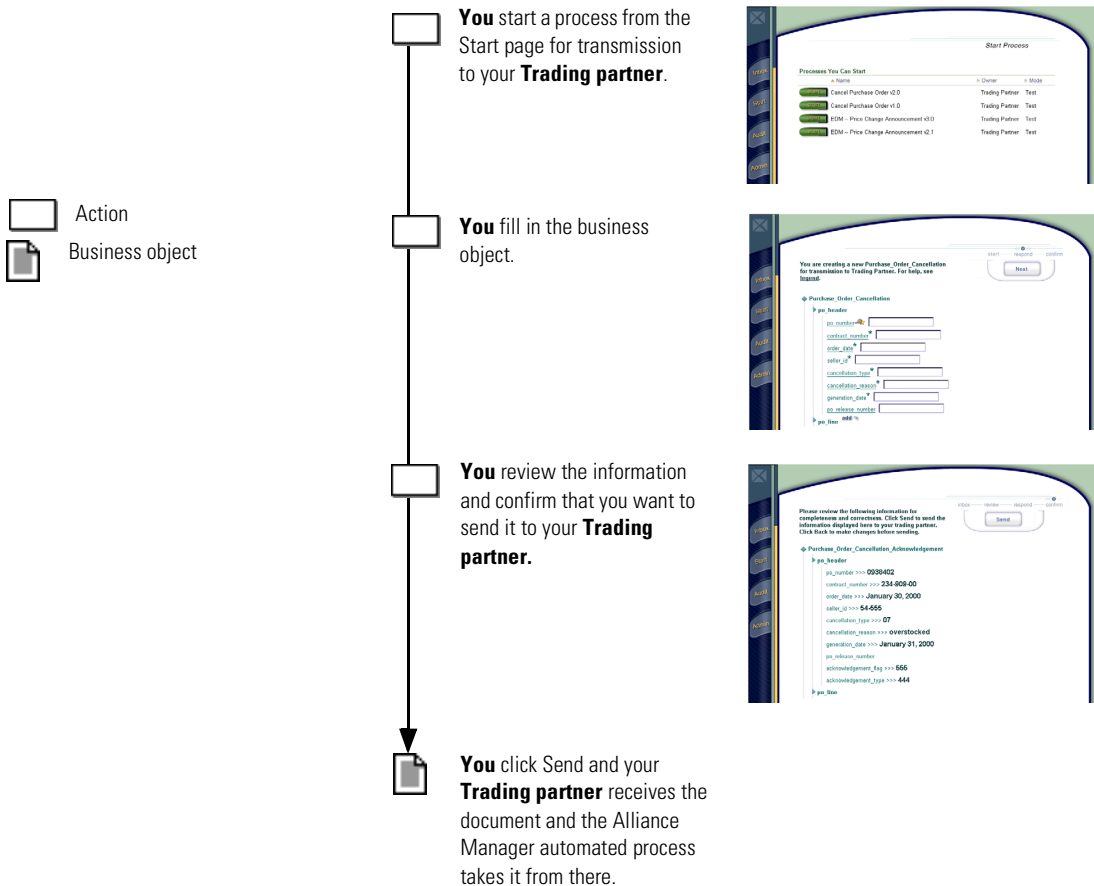


STARTING A PROCESS

Your trading partner also designs processes you can start.



The following illustration shows the steps you take in Extricity iForms to start a process.



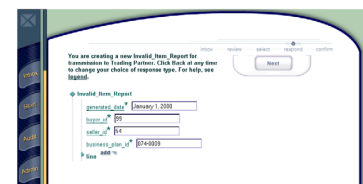
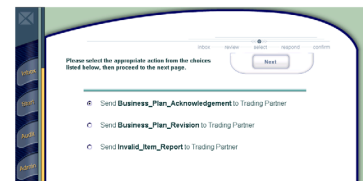
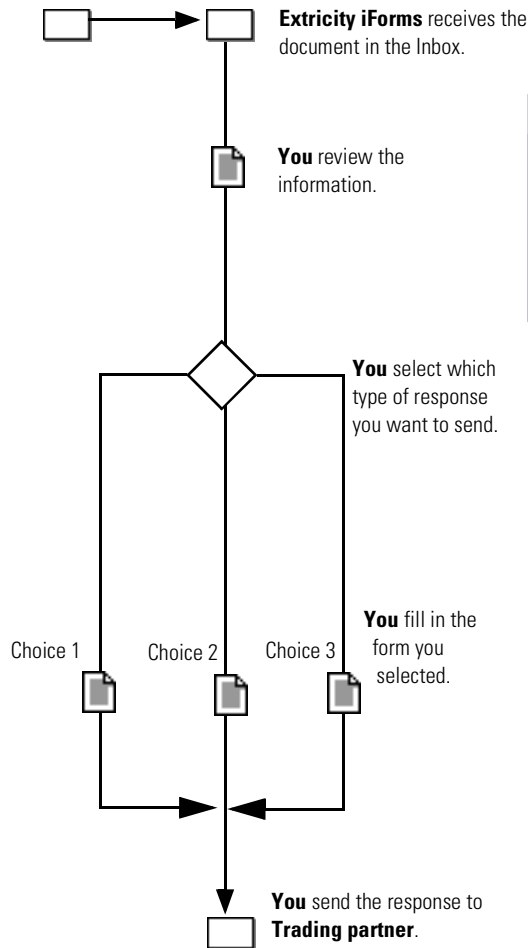
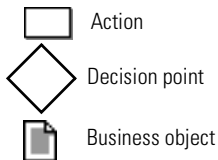
SELECTING FROM MULTIPLE CHOICES

In some cases, the process might involve a choice of responses. The process flow branches depending on the choice you make. For example, suppose your trading partner sends you a business plan with two possible responses: you received the business plan and you approve it, or you received it but you have some suggested revisions.



This shows a process that has three different responses.

Trading partner sends a business object for your review and response.



A similar flow also involves choices, but one of those choices requires that you fill out more than one form.

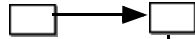


For example, suppose your trading partner sends you a purchase order. In this case, there are two possible scenarios:

- You have the item in stock and you send an acknowledgment to your trading partner.
- You don't have the item in stock and you send a backorder notice to your trading partner AND you send an order to your supplier.

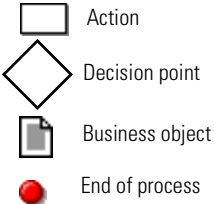
The following illustration shows a process where you have to choose among three different responses.

Trading partner sends a business object for your review and response.



Extricity iForms receives the document in the Inbox.

You review the information.



This Business_Plan was sent to you by Trading Partner.

Review the information below. Don't confuse the process by choosing an appropriate response on the next page.

From: Trading Partner

Business_Plan

- generated_date >>> January 1, 2000
- business_plan_id >>> 874.0009
- type_id >>> 99
- value_id >>> 54
- date_submitted >>> January 16, 2000
- forecast_start_date >>> March 1, 2000
- forecast_end_date >>> June 30, 2000
- forecast_period_code >>> 8
- product_family
- product_family_id >>> 440

You select which type of response you want to send, and one of the responses involves two forms.

Please select the appropriate action from the choices listed below, then proceed to the next page.

- Send Invalid_Item_Report to Trading Partner
- Send Business_Plan_Revision to Trading Partner
- Send Business_Plan_Acknowledgement to Trading Partner

Choice 1 Choice 2

You fill in the form you selected.



You fill in the forms.

Form one of two.

Please review the following information for completeness and correctness. Click Send to send the information displayed here to your trading partner. Click Back to make changes before sending.

Invalid_Item_Report

Business_Plan_Revision

- generated_date >>> January 1, 2000
- type_id >>> 99
- value_id >>> 54
- business_plan_id >>> 874.0009
- line

Form two of two.

You are creating a new Business_Plan_Revision for submission to Trading Partner.

This is Business Object 2 of 2. Click Back at any time to change your choice of response type. To help, see Digits.

Business_Plan_Revision

- generated_date >>> January 1, 2000
- type_id >>> 99
- value_id >>> 54
- date_submitted >>> January 16, 2000
- forecast_start_date >>> March 1, 2000
- forecast_end_date >>> June 30, 2000
- forecast_period_code >>> 8
- revision_number >>> 1
- business_plan_id >>> 874.0009
- product_family
- product_family_id >>> 440

You send the response to **Trading partner**.



You send the responses to **Trading partner(s)**.





GLOSSARY

action—a task performed as part of a private process. A private process action is the equivalent of a step in a public process. See the following terms in this glossary for more information about the action types you can include in a private process:

- approval action
- extension action
- mapping action
- notification action
- output object action
- script action
- subprocess action
- termination action
- timer action

See also *private process*.

adapter—the software bridge between Partner Agreement Manager processes and specific end-system and business-application interfaces. Adapters manage interactions between business applications and the Adapter Server. They allow private processes to interact with external business applications while a process is running, and they allow PAM to start public processes based on events that occur in external business applications. See also *adapter implementation*, *adapter instance*, *adapter type*.

adapter implementation—the implementation declaration for an adapter type. It specifies the name and location of the Java source file that defines the application logic used to communicate with a specific end system through that end system’s interface. The application logic is specified in the form of properties. See also *adapter*, *adapter instance*, *adapter type*.

adapter instance—an instance of an adapter implementation. The adapter instance is used in a private process extension action and provides the specific values to be used for the properties declared in the adapter implementation. See also *adapter*, *adapter implementation*, *adapter type*, *extension action*.

adapter type—a definition that is stored in XML format and specifies the adapter’s properties as well as the operations and events it supports. A single adapter type can have several implementations, and each implementation can have several instances. See also *adapter*, *adapter implementation*, *adapter instance*.

approval action—a private process action that you use to ask for a response from a user before letting the process continue to run. You can use an approval action, for example, to ask for an OK when a purchase order exceeds a predetermined amount. See also *private process*.

business object—a message transmitted as part of a public process. Business objects take the form of purchase orders, acknowledgments, requests for clarification, and so on. See also *business object type*.

business object type—a definition that determines the types of information a message can contain. It has three properties: the top-level element in its element definition set, its key field, and whether instances of it return audit information for non-repudiation purposes. The name of the business object type is the name of the element you select as its top-level element. See also *business object*, *element definition set*, *non-repudiation*.

business object variable—one of the two types of variables used in Partner Agreement Manager to store information within a process. Business object variables create an instance of a business object type. They can be used to store, for example, the outputs from extension actions, the inputs for map actions, or the inputs and outputs for subprocesses. See also *business object*, *business object type*, *extension action*, *variant variable*.

CA—see *certificate authority*.

certificate—a security document that binds a public encryption key to an entity (an individual or organization) known as the principal. The security document (a digital certificate) is signed by another entity known as the issuer. A digital certificate for which both the principal and issuer are the same entity is known as a self-signed certificate. A certificate for which the principal and issuer are different entities is issued by a certificate authority (CA) like VeriSign and is known as a CA-issued (or third-party-signed) certificate. Partner Agreement Manager supports both self-signed and CA-issued certificates. PAM also supports the binding of certificates to be used for signature authentication, message encryption, and SSL authentication for channels other than Partner Agreement Manager. See also *certificate authority*, *SSL*.

certificate authority—a trusted third-party organization or company that issues digital certificates used to create digital signatures and public-private key pairs. The role of the certificate authority, or CA, is to authenticate the entities (individuals or organizations) involved in electronic transactions. CAs are a critical component in data security and electronic commerce because they guarantee that the two parties exchanging information are really who they claim to be. See also *certificate*.

channel—a communications mechanism that encapsulates all the processing information needed to send messages to a partner's system, as well as to translate data received from a partner into Partner Agreement Manager messages. PAM provides channels for RosettaNet, EDI, cXML, and other systems and protocols. See also *message*.

digital certificate—see *certificate*.

DTD—Document Type Definition. A type of file associated with SGML and XML documents that defines how the formatting tags should be interpreted by the application presenting the document. In Partner Agreement Manager, a DTD file contains the complete description of a business object type's element definition set. See also *business object*, *business object type*, *element definition set*.

element definition set—a collection of data fields (or elements) or groups of data fields that defines the structure and meaning of a business object type. See also *business object*, *business object type*.

encryption certificate—see *certificate*.

event—a piece of information that comes into Partner Agreement Manager as a message from another source (an enterprise system or business application, for example) and triggers a public process. See also *message*.

event push—a method that uses the HTTP POST mechanism to push events into Partner Agreement Manager as a way to trigger processes. A port on the Process Server is set to listen for events in the form of HTTP POST messages. When a message is detected, PAM uses the information in the message to generate an event. See also *event*.

extended enterprise—a business model under which companies that work together as partners function as efficiently as a single organization through the implementation of automated communication technologies.

extension action—a private process action that communicates via an adapter with an external application that is registered with Partner Agreement Manager. You can use an extension action, for example, to launch a spreadsheet application, perform calculations, and update the enterprise system, or to get information from an enterprise system or listen for an event in the enterprise system. See also *adapter, private process*.

LDAP—Lightweight Directory Access Protocol. LDAP provides a standard method for accessing information from a central directory. After user authentication is set up in the LDAP directory, applications that use the LDAP protocol can retrieve the information from that directory. An authenticated user can log in to any application that supports the LDAP protocol with the same user name and password.

linked certificate—see *certificate*.

map—a Java Script or VBScript that inserts data into fields in an output business object type generated by a private process. The map specifies which fields in the output business object type receive data, and it identifies the information source.

map method—a reusable logical block of code that inserts data into a particular type of element or element sequence in a business object type. Within a map method, you can write the expressions that map individual input and output fields in the sequence. Or you can create a submap and drag input fields to output fields and have Partner Agreement Manager create the appropriate mapping expressions. See also *map, submap*.

mapping action—a private process action that you use to call a map. The map specifies the fields in a business object type that will receive data extracted from another source. You use a mapping action when you want to extract data from one business object type and insert it in a different business object type. For example, you use a mapping action to transform a purchase order generated by your inventory system into a sales order in a format that your partner expects. See also *map, private process*.

message—a structured communication used to pass information and control to another partner in a public process. The action in the process passes to the partner who receives the message. The content of a message is determined by its business object type. A message can be transmitted via synchronous or asynchronous methods, as determined by its communication service type. See *business object type*.

non-repudiation—a business object security feature that authenticates instances of a business object type and maintains an audit record to verify that they were received by the intended recipient. For business object instances that you receive, Partner Agreement Manager authenticates each instance and maintains an audit record to verify that the instance actually originated with the stated originator. If you disable auditing for a business object type, non-repudiation support is disabled for all messages that contain instances of that business object type.

notification action—a private process action that you use to send an e-mail, fax, or pager message to addressees that you specify. You use a notification action to inform someone inside or outside your organization that an event has occurred. For example, you can use a notification action to alert the order entry department when a purchase order arrives from a customer. See also *private process*.

output object action—a private process action that you use to bind a business object to the expected output object and path in a public process. You use an output object action at the point in a private process when you are ready to send a business object to the associated public process. This is typically the last action in the private process. See also *private process*.

partner group—a group of partners that perform the same role in a process at different times. Instead of duplicating a public process and substituting a different partner name, you can set up a partner group for the public process and then designate a specific partner as the participant when you start an instance of the process. For example, you might design a generic purchasing process that works equally well with any of your suppliers and then designate the appropriate partner when you start the process.

partner profile—information that identifies an organization, specifies a contact person in that organization, lists the communication services the organization supports, and defines the organization's security profile. When partners agree to participate in a public process, they must exchange profile information as a way to ensure authenticity before they can proceed.

PIP—Partner Interface Process. RosettaNet PIPs are specialized system-to-system XML-based dialogs that define business processes between supply-chain partners and provide models and documents for the implementation of e-commerce standards. Each PIP includes a technical specification based on the RosettaNet Implementation Framework (RNIF), a message guideline document with a PIP-specific version of the business dictionary, and an XML message guideline document. See also *RosettaNet*.

post method—the last block of code that is executed when a mapping action runs. Its only parameter is the output business object. You use the post method when you need to perform post-processing on the output business object. For example, you might use the post method to set the value of a summary field based on the number of line items in the output business object, or to examine a range of dates in a repeated group, extract the most recent date, and post that date in a header field. See also *mapping action*, *pre method*.

pre method—the first block of code that is executed when a mapping action runs. The pre method's parameters are the map inputs. You use the pre method to access a map's inputs and set global variables based on their content. See also *mapping action*, *post method*.

private process—a task or set of tasks that business partners participating in a public process perform at points where they need to take action internally. Partners participating in a public process must implement a private process for each public process step that they own. A private process begins with input from the public process and ends with output that feeds back into the public process. The input can be the receipt of a business object from a partner, or it can be a triggering event from an internal system. The output is the business object that transfers control back to the public process. See also *action*, *process*, *public process*.

private process action—see *action*.

process—the flow of actions and the exchange of business information between partners in an extended enterprise. A process operates on two levels, public and private. See *extended enterprise*, *private process*, *public process*.

public process—the step-by-step flow of messages, events, and actions between two or more business partners. Public processes are set up by agreement between partners, and each step in a public process has a private process associated with it. A public process is developed by one partner, and all the partners who participate in it must review and approve it before it can be implemented. The partner who designs a public process is its owner. See also *private process*, *process*.

RosettaNet—a consortium of major information technology, electronic components, and semiconductor manufacturing companies that is working to create and implement industry-wide, open e-business process standards. See also *PIP*.

script action—a private process action that consists of a script written in VBScript or JavaScript and is designed to manipulate information or set up conditional actions based on input. You use a script to establish decision-making criteria for branches or loops, to set variables, or to calculate values that are used elsewhere in the private process. See also *private process*.

security certificate—see *certificate*.

self-signed certificate—see *certificate*.

signature certificate—see *certificate*.

SSL—Secure Sockets Layer. The SSL protocol is a security protocol that provides for communications privacy and reliability over the Internet. The protocol allows client/server applications to communicate in a way that is designed to prevent eavesdropping, tampering, or message forgery.

submap—a secondary level map that is called by a map method to insert data into an output element other than the top-level element. See *map*, *map method*.

subprocess action—a private process action you use to call an existing public process. You can call any public process in which your organization owns the first partner action. For example, you can use a subprocess to get a quote approved by a third-party supplier before responding to a customer. See also *private process*.

termination action—a private process action that you use to stop a process at a predetermined point for a reason that you specify. You can use a termination action to deal with errors in data that might prevent a process from completing successfully. For example, you might want to stop a process in cases where an enterprise system passes incomplete or corrupted information to it. See also *private process*.

third-party-signed certificate—another name for a CA-issued certificate. See *certificate*.

timer action—a private process action that you use to insert a pause. You can use a timer action to specify the period of time you want to elapse before the next action in the process starts. See also *private process*.

variant variable—single field variables. Variant variables store text strings—the type of information contained in a single field element. You can use variant variables to store the input for actions, to set flags (such as the time-out flag for an approval action), to move information within scripts, or to store the results of an approval action. See also *business object variable*.



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